2004 CLIENT SATISFACTION REVIEW

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FINAL

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LIST OF ACRONYMS

ALEB	Agriculture-Led Export Businesses
AgLink	Agribusiness Linkages to Egypt
CSR	Client Satisfaction Review
EUREGAP	Euro Retailer Produce Working Group Good Agricultural Practice Assessment
Expo Link	Egyptian Exporters Association
GAAP	Generally Accepted Accounting Principles
GAP	Good Agriculture Practices
GMP	Good Manufacturing Practices
GOEIC	General Organization of Export & Import Control
HACCP	Hazard Analysis & Critical Control Points
HEIA	Horticultural Export Improvement Association
IPM	Integrated Pest Management
IRA	Industry Rapid Analysis
ISO	International Organization for Standardization
IT	Information Technology
IR2	Intermediate Results 2
MALR	Ministry of Agriculture & Land Reclamation
MOU	Memorandum of Understanding
SAS	Strategic Alliance Services Sector
SO16	Strategic Objective 16
SOW	Scope of Work
SPS	Symantec Product Specialist
SSOP	Shrink Small Outline Package
TA	Technical Assistance
TQM	Total Quality Management

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EXECUTIVE SUMMARY

The Client Satisfaction Review (CSR) analyzes services provided by five USAID Partners to three target client groups: private firms, trade associations, and smallholders. All five Partners—Egyptian Exporters Association (ExpoLink), the Horticulture Export Improvement Association (HEIA), Agriculture-Led Export Businesses (ALEB), Agribusiness Linkages (AgLink), and AgReform—work within the Growth Through Globalization (GTG) portfolio, which aims to promote increased private sector competitiveness. This CSR is the sixth such study to be carried out in Egypt of USAID Partner services, and as such, aims to build on findings of previous reviews. It explores client perspectives on the content and quality of Partner services, and their assessment of the result of these services on their income, exports, production, and employment. Clients rate how satisfied they have been with Partner services, and offer their suggestions for improvement.

<u>Private Sector Firms</u>

ExpoLink, HEIA, and ALEB provide technical assistance, training, and marketing services to businesses in greater Cairo and Alexandria. As in 2003, 72 percent of firms again stated that they were satisfied with Partner services overall, and the majority would recommend them to other firms. Some noteworthy changes, however, have occurred over the past year, and satisfaction ratings for most individual services have increased. Rates of implementation have witnessed a dramatic rise, from 33 percent last year to 67 percent this year, with an additional 20 percent reporting that they implemented some, but not all, of consultants' recommendations. These strong improvements are due in part to changes in Partners' approach to service delivery (relying on tried and tested consultants familiar with the conditions in Egypt, and charging the majority of members for the consultant visits), and to the lag-time required for firms to process recommendations and actually implement changes based on the situation of the individual firm as well as the overall economy.

While noting the enhancements made based on last year's recommendations, firms offered further suggestions of how to increase clients' access to technical services, how to make marketing services more responsive to their needs, and how to improve Partner-client communication. With the increase in the number of smaller firms over the past year, this year's CSR also includes a separate section of recommendations concerning the needs and recommendations of SMEs.

<u>Trade and Business Associations</u>

ALEB assists trade associations to improve and increase service provision to members, expand membership enrollment, and become sustainable, member-led organizations. All ten associations observed that they were satisfied with these services, and all of them would recommend them to others. The large majority of associations assess that they have developed the capacity to continue to function to the benefit of members without ALEB, and many have identified new sources of financial and technical support to assist them to further enhance services and modernize management practices. However, these findings are based on subjective assessments from association management that may, or may not, fully reflect the reality of these associations' capacity. Associations' suggestions to enhance particular services include increasing chances for peer-based learning, expanding training topics, and enhancing service follow-up and Partner-association coordination.

Smallholders

AgLink and AgReform have both finished out their last year of service provision in the past year, and farmers were therefore asked to assess services that they had received, but were no longer receiving, from Partners. Largely due to the (albeit temporary) cessation of services, satisfaction ratings this year dipped from an astounding 99 percent last year to 89 percent this year. Nearly all farmers estimated that their income as well as their production had increased as a result of Partner assistance, and the majority of smallholders spent part of their increased incomes in household education and health, on farm improvements, and increased food consumption, particularly vegetables and dairy. Farmers recommended that Partners increase assistance in areas related to livestock and crop production and in marketing. Farmers also had a number of ideas on how their associations could best meet farmer needs. Farmers' comments largely focused on how associations could increase members' access to new export market opportunities, coordinate their purchase of input supplies, and enhance their collective marketing activities both locally and abroad.

Management Implications

After eight years in operation, Growth Through Globalization (GTG) is nearing the end of a critical transition period. Certain activities will close, or have already closed (ALEB, AgLink, and AgReform), others will continue without direct USAID support (ExpoLink and HEIA), and new Partners have begun to carry on assistance to Egypt's private sector (AERI). These changes present new challenges and opportunities for USAID and Partners.

Businesses will continue to expect high-quality services from HEIA and ExpoLink, and will look to these and other associations to provide a number of the services that had begun under ALEB. To what extent this will happen now depends on the capacity and willingness of these associations to take on this extra role. ExpoLink, HEIA, and other trade associations will need to review their current services, costs, and funding sources, and should explore the opportunities available under the grant component of AERI. Sustainability, however, is more than just funding, and external assessments have indicated that a number of these associations continue to require additional technical assistance to develop and maintain in-demand services for their members.

USAID management and its Partners also have the opportunity to step back and assess lessons learned and the impact that these activities have had across the country. With smallholders, USAID might consider implementing a follow-up analysis to understand what has, and has not happened, in those areas (particularly Lower Egypt) where smallholders are *no longer* receiving services from any USAID Partner. Such a study would aim to develop a clear understanding of what the final impact was of eight years of assistance, including what long-term, sustainable improvements have been made for these farmers, and what, if anything, was not sustained and/or left unfinished.

CHAPTER ONE: INTRODUCTION

USAID assistance strategy in Egypt emphasizes private sector development as a means of fostering rapid economic growth. One primary objective towards the realization of this goal is to enhance the business environment for the emergence of competitive Egyptian firms, capable of expanding their export opportunities and promoting growth. In order to assess progress towards these goals, periodic Client Satisfaction Reviews (CSRs) have been conducted. A Client Satisfaction Review aims to measure the content, quality, and results of Partner services from the perspective of the clients themselves, with a focus on which services are considered particularly effective by clients, and how USAID Partners may further enhance services.

The 2004 CSR is the sixth such study to be carried out in Egypt of USAID Partner services. It was conducted by the Results Reporting Support Activity (RRSA), which represents an endeavor to provide quality assurance services for USAID/Egypt's economic growth strategy and to USAID Partners who implement that strategy.[1] RRSA carried out the CSR survey during June to September 2004.

PURPOSE

The 2004 CSR analyzes services provided by five Partners within the Growth through Globalization (GTG) Program to three target beneficiary groups: private firms, trade associations, and smallholders. Following up on findings of the 2003 Review, it explores client perspectives on the content, quality, and results of Partner services. The CSR also provides a forum for clients to rate how satisfied they have been with Partner services, and for clients to offer their recommendations on how better to meet their needs. These recommendations are from the clients themselves, and do not necessarily represent the opinions of RRSA.

The purpose of the CSR is:

(i) To define in detail what services USAID Partners have provided to different beneficiary groups;
(ii) To determine from the client perspective to what degree services have resulted in expanded employment opportunities and increased income for client firms, trade associations, and small farmers;
(iii) To determine client overall level of satisfaction of the services received from Partners;
(iv) To gather recommendations from clients on unmet needs and ways to further enhance USAID service delivery;
(v) To compare results and input of the 2004 review with findings from the 2003 CSR.
(vi) To explore in greater detail questions of implementation, sustainability, and impact.

[1] RRSA is implemented by Development Associates under MOBIS Contract No. GS-10F-0185K.

PARTNER PROFILES

The Client Satisfaction Review analyzes clients' perspectives of the services of five USAID Partners: the Egyptian Exporters Association (ExpoLink), the Horticulture Export Improvement Association (HEIA), Agriculture-Led Export Businesses (ALEB), Agribusiness Linkages to Egypt (AgLink), and Agricultural Reform (AgReform).[2] These Partners are all part of the Growth through Globalization (GTG) program. GTG is a comprehensive package of activities which aims to accelerate economic growth and job creation through increased trade and investment in areas in which Egypt is deemed to have a competitive advantage. Thus, while Partners within GTG work with a diverse array of client groups and offer a wide range of services, all share the central goal of promoting opportunities for private sector growth in Egypt. All Partners offer their clients service packages encompassing technical assistance and training as well as marketing support based on clients' diverse needs.[3]

ExpoLink and HEIA are both private sector associations founded and composed of members of the Egyptian business community who aim to stimulate Egyptian exports in key sectors. ALEB, in turn, is a USAID activity that focuses on the development of the processed food sector. These three Partners primarily work with medium- to large-scale businesses[4], and it is not uncommon to find firms who have, for example, received training from HEIA, market information from ALEB, and attended a trade fair with ExpoLink.

AgLink and AgReform both completed their final year of assistance to smallholders and farmer associations in late 2003 and early 2004. Over the past eight years, these Partners have worked with small- to medium-scale farmers and farmer associations in Upper and Lower Egypt. AgLink has focused on smallholders working in the livestock and dairy sectors while AgReform has focused on farmer and processor associations promoting horticulture. Both had field offices in rural Egypt, and both also worked with extension officers from the Ministry of Agriculture and Land Reclamation (MALR) to reach the maximum number of farmers.

METHODOLOGY

The Client Satisfaction Review covered a large and heterogeneous population that varied by geographical location, unit of analysis, and the number and type of services utilized. Because of this, it was important to select a sample frame that, while maximizing limited time, human, and financial resources, was also representative of this larger universe of clients.

The CSR team therefore designed the survey to focus on a representative sample of businesses and smallholders across the country, as well as all trade associations

[2] ExpoLink is implemented by the Egyptian Exporters Association (EEA); ALEB is implemented by ABT Associates; AgLink is implemented by ACDI/VOCA; AgReform is implemented by CARE International; and HEIA is implemented by the Horticulture Export Improvement Association.

[3] For more detailed information on Partner services, refer to Appendix VI in the 2003 CSR.

[4] ALEB also works with business associations.

considered active clients. The team interviewed 200 businesses, 10 associations, and 130 smallholders in seven governorates: Cairo, Giza, Alexandria, Fayoum, Minya, Qena, and Sohag.[5] For the business sample, basic statistical calculations were employed to determine the size of the sample frame based on 2004 client lists from Partners.[6] For trade associations, the survey team interviewed all associations considered to be active recipients of ALEB services. For smallholders, survey teams interviewed the same group of smallholders as the 2003 CSR in order to develop a greater understanding of the impact of Partner services at the household level in rural areas.[7] Interviewers received a significant amount of assistance from Partners' field offices in terms of transportation, lodging, and locating interviewees.[8]

STRUCTURE OF THE PAPER

The CSR is a review of the content and quality of service packages from the perspective of Partners' clients. Chapter 2 begins with an examination of Partner services offered to private sector firms. It explores the different types of services offered, and firms' assessments of the results of these services on business performance. Chapter 3 looks at services provided to trade associations. These associations analyze the quality and impact of services on their ability to function as sustainable, member-driven associations with the longer-term aim of operating without Partner assistance. Chapter 4 examines services provided to smallholders in Upper Egypt. Farmers assess the impact of Partner services on smallholder production and income. Chapter 5 summarizes key unmet needs of USAID beneficiaries, as well as their thoughts on how to enhance Partner services to meet these needs. Based upon client recommendations, the chapter concludes with an analysis of the implications of these findings on USAID management priorities.

[5] While Partners work in over 20 governorates, these seven areas represented 85 percent of the total client population in Egypt.
[6] A more detailed description of the methodology employed is found in Appendix I of the 2003 CSR.
[7] However, due to logistical constraints from the closing of field offices in Lower Egypt, the survey teams did not interview smallholders in Daqhaleya and Alexandria this year. This issue is further described in Chapter Four on smallholders.
[8] Partners gave field office staff explicit instructions not to be present during interviews.

CHAPTER TWO: PRIVATE BUSINESS ASSESSMENTS

INTRODUCTION

Partners serve 1693 firms in the manufacturing, trade, agribusiness, and service sectors located in 23 governorates. ExpoLink, ALEB, and HEIA provide consulting, training and marketing assistance to private sector firms in areas in which Egypt is deemed to have a competitive advantage. Services include, but are not limited to, assisting businesses with financial, marketing, production, organization, and technical problems and feasibility studies. Assistance is provided to both current and potential exporters.

This chapter discusses client views of the technical assistance, training, and marketing services offered by Partners, including firms' satisfaction with these services.[9] Because Partners are now in a state of transition, the concluding section focuses on how services may be enhanced and continued through those activities that will remain in operation after 2004.

PROFILE OF BUSINESSES RECEIVING USAID SERVICES

The 2004 Client Satisfaction Review interviewed 200 businesses in greater Cairo and Alexandria. The number of interviews per Partner was weighted by their share of the total client population.[10]

Firms interviewed in this year's CSR have averaged twelve years of operation. As with the 2003 CSR firms, the majority of clients work in the manufacturing and agribusiness sectors, although the number of clients in agribusiness has increased relative to other sectors.

Figure 2.1: Surveyed Firms by Sector 2003

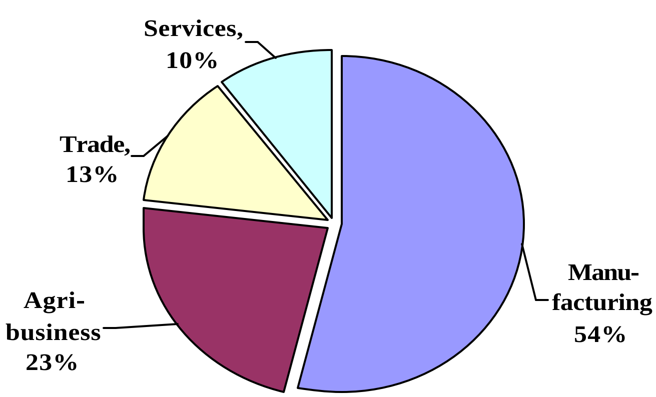
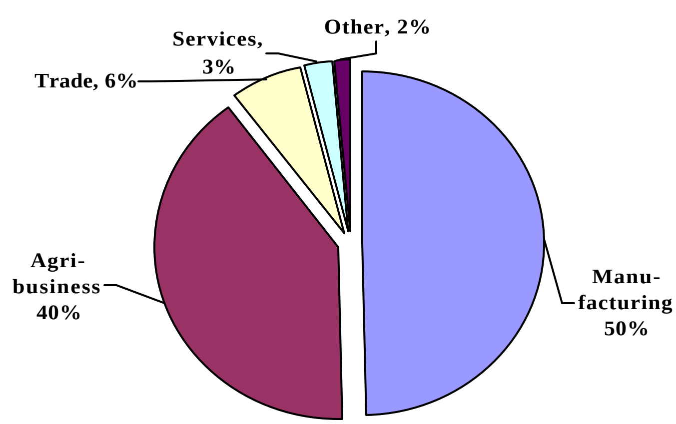


Figure 2.2: Surveyed Firms by Sector 2004



9 All firm responses were disaggregated by size and sector to determine any patterns. When not noted, there was no statistically significant difference in response by size or sector.

10 ExpoLink: 81 interviews; ALEB: 53 interviews; HEIA: 66 interviews.

Firm size can be assessed in a number of ways, including the number of employees, the value of annual domestic sales, and the value of annual exports. In terms of employment, most client firms are either large companies employing more than 100 employees, or small companies employing between 11 and 50 employees.[11]

As shown in the figures below, in 2004 the proportion of smaller companies receiving services has increased compared with 2003. This may in part be due to HEIA's dramatic increase in membership rosters in the past year, the large majority of whom were small and medium-sized growers with relatively small numbers of employees.[12]

Figure 2.3: Firms surveyed in 2003

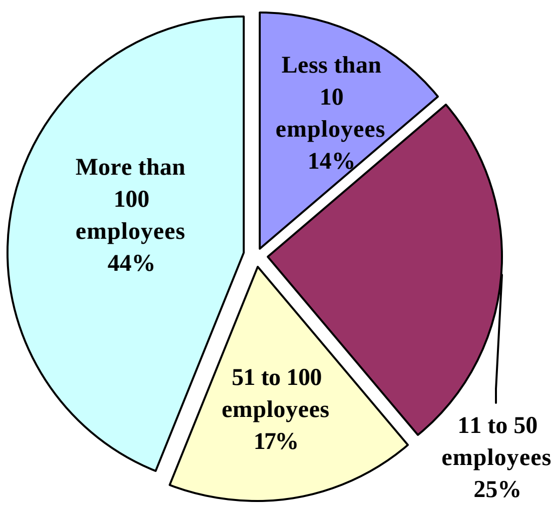
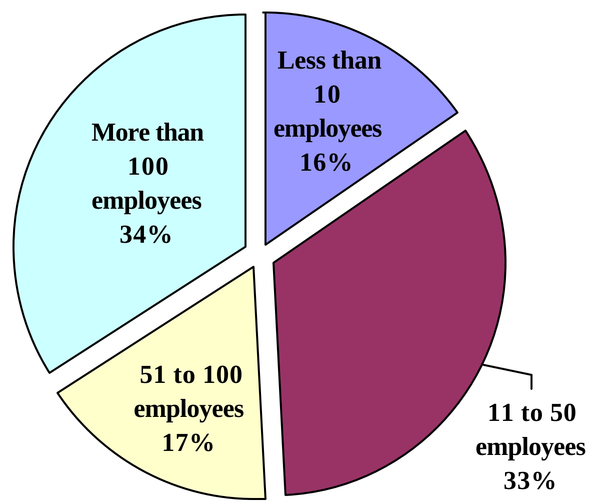


Figure 2.4: Firms surveyed in 2004



Firms were asked to compare their employment figures from 2003 and 2004 as one measure of the expansion of the company. The large majority of client firms did in fact report that they had hired more employees in the past year. On average, firms increased their employment by six percent since 2003.

Shown in the following charts, firms also provided figures on annual domestic sales and exports.[13] The largest proportion of firms has annual domestic sales of between one and ten million Egyptian pounds. The largest proportion also has annual exports of between one and ten million Egyptian pounds. Slightly more than a quarter of Partners' clients do not currently export.

[11] In the CSR, firms with more than one hundred employees are large, medium firms have between 51 and 100 employees, small firms have between 10 and 50 employees, and microenterprises have less than 10 employees.

[12] Communication with Mr. Wael Refae, 20 October 2004.

[13] The 2003 CSR had also asked these figures, but firms were largely reticent to report exact numbers (less than 50 percent responded). In order to attempt to increase response rates, this year's survey provided a range (less than one million, 1-10 million, 11-20 million, and more than 20 million). This proved highly successful, as only 4 percent of firms refused to respond to the question.

Figure 2.5: Domestic Annual Sales

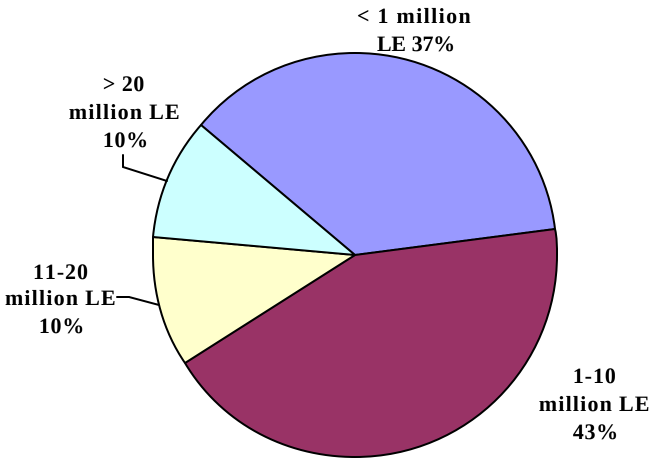
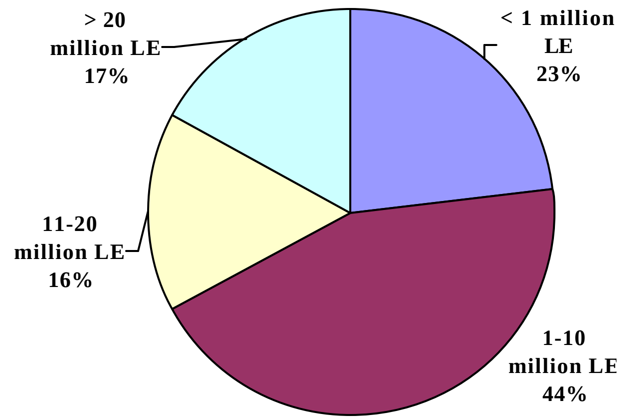


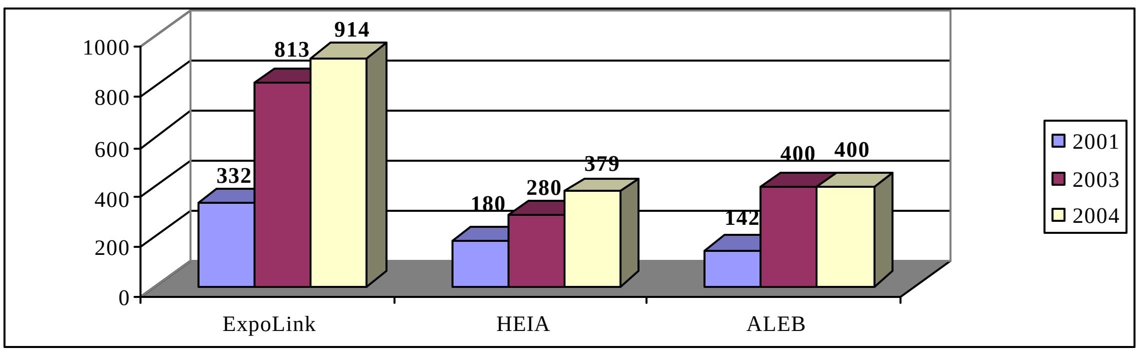
Figure 2.6: Annual Exports



REASONS FOR WORKING WITH PARTNERS

The number of clients continues to grow, and compared with 2003, Partners increased their client rosters by 13 percent.[14]

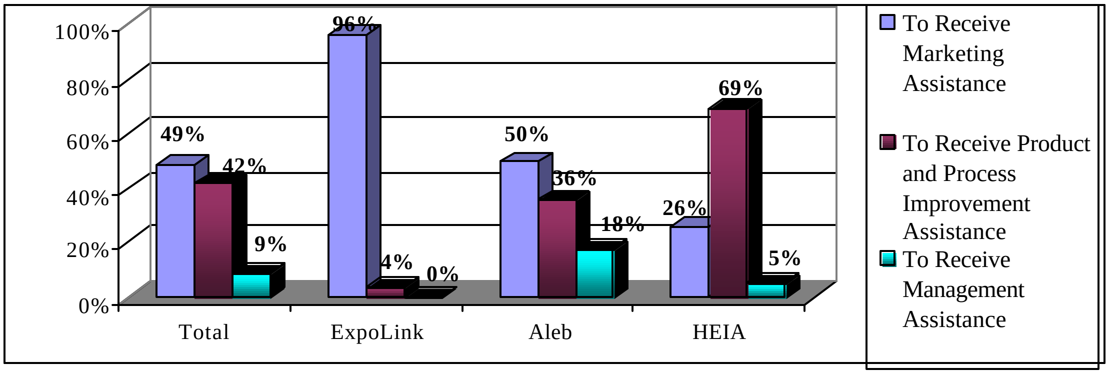
Figure 2.7: Growth in Business Clients: 2001-2004



Clients have received assistance from Partners for an average of three years, and 95 percent report that they still receive assistance. As would be expected given the diversity of services offered by Partners, clients decided to work with different Partners for different reasons. As shown below, the majority of ExpoLink and ALEB clients began to participate in Partner programs in order to receive marketing assistance, while HEIA members prioritize assistance in product and process improvement. Only a minority of clients of any Partner joined for management assistance, with the largest proportion found in ALEB.

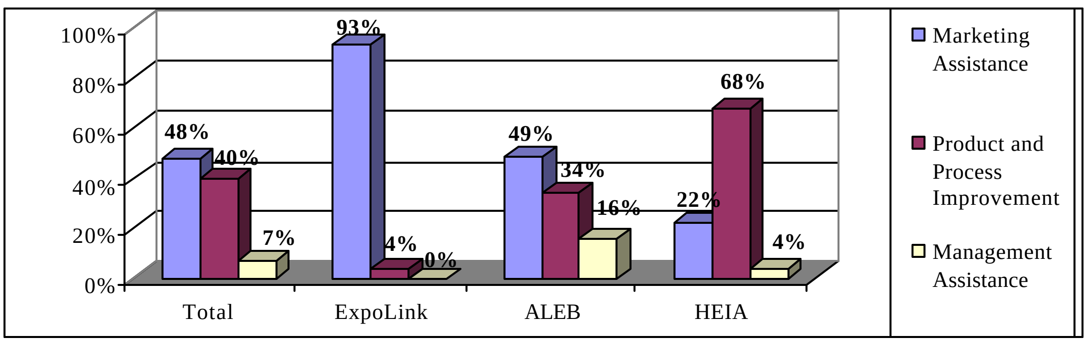
[14] Because ALEB is in its final year, it has focused on those firms with a demonstrated dedication to improving their operations and on making certain services sustainable, rather than on increasing the number of total clients served.

Figure 2.8: Firms' Self-Reported Reasons for Participating, by Partner



Partners continue to respond to clients' needs, as the majority of firms received one or more marketing services, followed by technical assistance and finally management training.

Figure 2.9: Services Clients Received, by Partner



While the majority of firms continue to receive assistance, five percent did report having stopped working with Partners. Of the ten firms surveyed who have stopped participating in Partner programs, three no longer require assistance and one has graduated from the program. For the remaining six former clients, four noted that they had not been pleased with the manner in which Partners had dealt with them, and two stated that the services offered simply were not useful to their firms.

OVERALL SATISFACTION

There was no change in levels of overall satisfaction with Partner services compared with the 2003 CSR. In 2004, 72 percent of firms again stated that they were satisfied or very satisfied with Partner services overall. However, further discussed below, satisfaction ratings by type of service have changed compared with last year, largely for the better.

SERVICES

ON-SITE CONSULTANT VISITS

All three Partners dealing with businesses provide technical assistance services to their customers. Technical assistance in the CSR is defined as targeted firm-level assistance provided by local or international consultants who conduct field visits to individual firms. ExpoLink, HEIA, and ALEB collectively provide assistance in the adoption of new technologies; production efficiency; product development; and development and implementation of improved quality control programs.

Twenty nine percent of firms received a consultant visit in the past year from one or more of the Partners. Three quarters of firms reported that the consultant had spent between half a day and a full day at the firm, and close to twenty percent of firms had a consultant work with the company for more than three days.

All firms who had received a technical consultant visit stated that the Partner had identified the consultant for them. Approximately 80 percent reported that they had signed up to meet with a consultant who had been contracted by the Partner to visit a number of firms while in-country, and the remaining 20 percent reported that the Partner had identified the consultant in response to a specific request from the firm. As would be expected, the large majority of the consultants who worked with a company for more than three days were also those who had been hired following a specific request from a client company.

More than two thirds of the firms paid for some or all of the cost of the consultant visit, with an average payment of LE 1,100 per firm. This is a noTable increase over last year, where only slightly more than half paid. Of the firms who paid for the on-site consultation, 22 percent signed a contract with the consultant defining the terms of the agreement.

RATES OF IMPLEMENTATION

In the 2003 CSR, only one third of the firms who had received an on-site consultant visit stated that they had implemented the recommendations offered them by the consultant. The primary reason firms gave for not implementing recommendations was lack of financial resources. In order to gain a better understanding of firms' experiences with consultant visits, the 2004 CSR asked a number of questions to follow up on these findings.

This year's responses are strikingly different from those of last year. While only one third had reported following the consultant's advice in the 2003 survey, fully two thirds reported that they implemented all of the recommendations this year. Furthermore, another 29 percent stated that they had implemented some, but not all, of the consultant recommendations. This means that in total only 5.5 percent of firms implemented *none* of the recommendations.

As would be expected, the types of recommendations implemented depended upon the type of business. Large farmer exporters largely followed consultants' suggestions concerning ways to improve horticultural quality in order to meet the standards of the international market and to become EUREPGAP certified (e.g., pre- and post-harvest production, irrigation methods, fertilization techniques, pest control, packing, etc.). Food processing companies implemented recommendations concerning how to improve production, packaging, and labeling for export and to become HACCP certified (e.g., freezing and dehydration, food analysis, produce storage, label design, etc.). Firms in other sectors such as furniture followed consultants' advice on how to increase exports by catering their products, trade fair exhibitions, and marketing strategies to meet foreign demand.

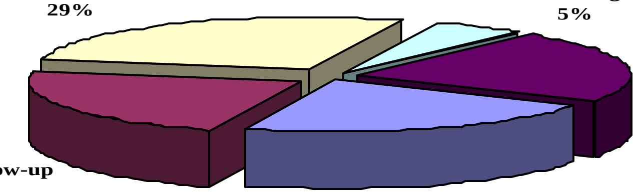
Firms largely did not implement recommendations that they considered to be too costly or inappropriate for their firm or farm. Farmer exporters described expensive land restructuring techniques and extensive greenhouse modifications that they did not implement. Some food processing and manufacturing companies, in turn, did not purchase costly capital equipment and make extensive factory renovations that were recommended.

Firms gave several reasons for not implementing particular recommendations. As noted above, the primary reason given by firms last year was that the firm lacked financial resources. Indeed, this year's respondents emphasized that financial considerations are at the forefront of business managers' minds when deciding whether to modify production processes, purchase equipment, reorganize a factory, redesign a product, etc. However, concern over finances does not mean that firms necessarily lack access to credit, as were the preliminary indications from 2003. Indeed, only five percent of firms this year stated that lack of access to credit was the number one reason that they did not follow a consultant's suggestions.[15]

Shown below, the largest proportion of firms stated that they plan to implement the recommendations in the future, but that they are waiting for market conditions to improve. Additionally, approximately one fifth of firms noted that the recommendations were not appropriate to the firm (and in the case of farms, the growing conditions of Egypt). Another 22 percent observed that they required follow-up assistance in order to implement the suggestions.

[15] ALEB has also expanded its credit facilitation program this year. In the past year, the number of loan requests from clients grew by 66 percent, as did the loan request portfolio ($215 million to $358 million). The growth of the loan request portfolio indicates that the industry has become more aware of ALEB's credit access services.

Figure 2.10: Primary Reason for Not Implementing a Consultant's Recommendations



There was no statistically significant relationship between rates of implementation and firm size or sector. Additionally, firms were as likely to implement recommendations from local consultants as foreign consultants, and rates of satisfaction between local and foreign consultants did not differ statistically. In fact, there are some indications that local experts were preferred in particular cases. In the qualitative responses, a number of firms noted that Egyptian consultants had a better understanding of the local environment and constraints facing businesses, and were able to communicate more effectively with the firms. This was particularly the case with recommendations involving plant modifications and farm production. Increased rates of implementation this year may therefore be partly attributable to ALEB and HEIA's increased reliance on local consultants who have been well-trained by Partners and the foreign consultants with whom they were paired in the past, and who are well-versed in what practical recommendations can be most easily implemented by client firms.

One additional noteworthy finding is that there is a statistically significant correlation between whether a firm paid for the consultant and whether the recommendations were implemented. This is not surprising, as businesses are more likely to take the consultation of an expert that they paid for more seriously than one who visited the firm as a "free service." Partners' approach to service delivery, both in terms of the types of consultants recruited as well as the increased emphasis on paying for consultants, have therefore potentially contributed to the increase in implementations this year.

SATISFACTION RATINGS

The vast majority of firms (93 percent) who received technical consultants stated that they were satisfied or very satisfied, and 98 percent would recommend them to other firms.[16] This is an increase over last year, in which 84 percent were satisfied and 96 percent would recommend consultant visits to others.

Firms provided a number of reasons for why they were satisfied. The majority of firms noted that consultants were knowledgeable and provided sound recommendations. More than one third of respondents (35 percent) stated that their ability to compete in foreign

[16] 53 firms satisfied, 56 (of 57) recommend to others.

markets had increased as a result of the consultant's visit. Furthermore, approximately a quarter observed that the quality of the firm's product had improved (27 percent) and that production processes had become more efficient (24 percent).

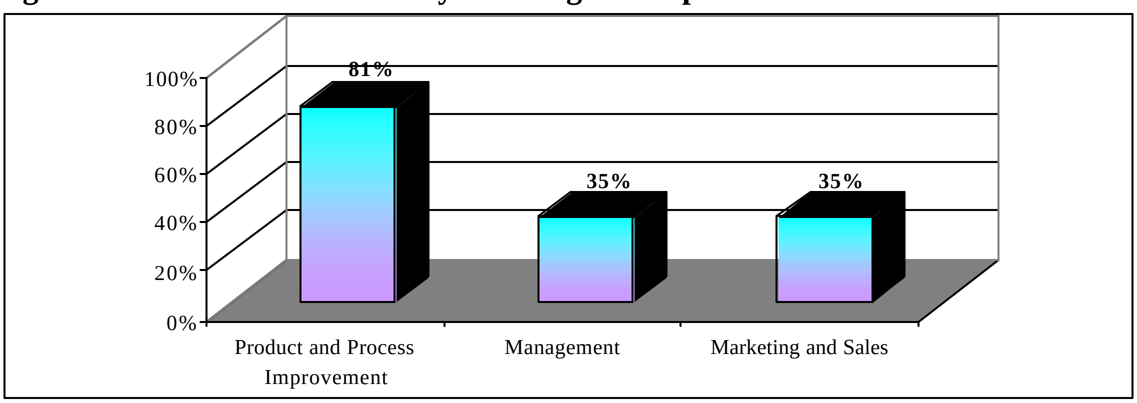
Food processor increases production and improves quality with advice from ALEB expert visit

In early 2004, El Nenaiea Company requested ALEB's assistance contracting a consultant to provide advice on plant improvements. The consultant recommended that the company install a new size classification and air separation system for dehydrated onions in addition to other layout recommendations in order to improve plant efficiency. El Nenaiea followed the consultant's recommendations closely, and the company is now producing three times the yield at the same cost, with significant improvements in product quality.

TRAINING

ALEB and HEIA offer training services encompassing a variety of formats and topics. These training sessions are aimed at workers, mid-level management, and business executives, and are conducted through courses, workshops, seminars, and study tours. In the CSR sample, close to half of all firms (48 percent) attended one or more training session this year.[17] As shown below, the majority of firms who attended training sessions focused on product and process improvement courses.[18]

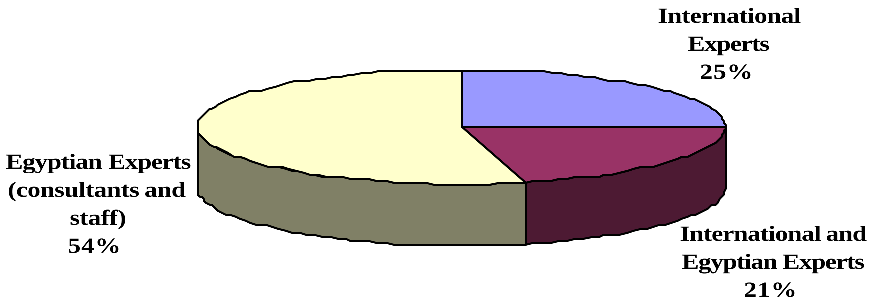
Figure 2.11: Courses Attended by Training Participants



Partners have made a strong effort to involve local experts and staff in providing training services. Indeed, only one quarter of training sessions attended by CSR respondents were conducted solely by international consultants, and more than half were provided by local consultants and/or local staff.

[17] 94 firms had employees attend one or more training course.
[18] 76 firms (of 94 total firms who received training) attended courses in product and process improvement, 33 firms attended courses in management, and 33 attended marketing.

Figure 2.12: Profile of Trainers



However, while the number of local trainers has increased, client firms do not rate them as highly as those taught by their international counterparts. In fact, there is a highly statistically significant difference between satisfaction ratings of local versus international trainers for courses in product and process improvement, with businesses more satisfied with courses taught by expat trainers.[19] This finding indicates that local trainers may continue to need more training, particularly in technical areas related to product and process improvement.

SATISFACTION RATINGS

The large majority of firms who received training (89 percent) stated that they were satisfied or very satisfied with the overall quality and content of the courses, and an overwhelming 99 percent would recommend the training to others.[20] These numbers also represent a slight increase over last year, when 85 percent had been satisfied and 92 percent would recommend the courses to other firms.

When responding to why they were satisfied, firms noted that training courses introduced them to new, modern methods of production, enhanced management skills, and assisted them to develop alternative marketing strategies to successfully compete in the export market.[21] A number of clients noted that courses had become more specialized this year in response to last year's suggestions, and firms who had received in-house training for their workers were particularly satisfied. Training course topics considered most beneficial by training participants are highlighted in the following sections.

<u>Product & process improvement</u>

ALEB and HEIA offer courses in quality control, product improvement, and meeting international certification standards. Seventy-six firms sent an average of four employees each to receive training in product and process improvement this year.

ALEB offers courses in areas such as EU food labeling regulations, process measurement, HACCP (Hazard Analysis and Critical Control Points), and other programs

[19] However, this relationship does not hold with courses in management or marketing courses.
[20] Information on specific types of training are discussed below.
[21] Improved production techniques: 60 percent of attendees; improved management skills: 51 percent; new marketing strategies: 40 percent.

that focus on HACCP prerequisites, such as pest control and sanitation. ALEB fees average LE 100 per participant per day for each two- to three-day training course.[22] In total, ALEB conducted 30 training programs for food processors on technical issues in 2004. ALEB clients this year particularly noted the value of all courses related to HACCP, including certification procedures, HACCP auditing, worker safety and hygiene, and quality control.

HEIA provides training courses for top management of member farms and companies in order to introduce GAP specifications in preparation for audit and certification, and 29 farms were EUREPGAP certified at the end of 2003. This year, HEIA has assisted 20 of these farms renew their certification, and assisted 16 new firms become certified for the first time. HEIA members' comments largely focused on the value of the certification courses (both GAP and HACCP) as well as the usefulness of the Arabic-language training for middle managers on members' farms. This training covers GAP-related issues in worker health and safety and pre- and post-harvest production processes.

Ninety percent of firms who attended training in product and process improvement reported that they implemented some or all of the ideas that they had received, and 99 percent would recommend that other firms attend the same training. Furthermore, 90 percent of these firms were satisfied or very satisfied, an increase of six points over last year satisfaction ratings.

Satisfied firms noted that the training had taught them ways to improve production and that the trainers were excellent. A number of new firms have also begun the process of becoming certified (GAP and HACCP) this year due to Partner training.

Horticultural exporter becomes EurepGap certified and begins exporting to Europe following HEIA training sessions

Orchard Company is an export-oriented horticultural firm that has been a member of HEIA since 2002. Interested in learning what is required to export to Europe, Orchard attended a seminar series organized by HEIA concerning EurepGap quality standards and requirements for certification. Following these sessions, the company developed its own quality assurance management system, and obtained EurepGap certification this year. It now exports to seven clients in England, and anticipates even greater sales in the next harvest season.

<u>Management Training</u>

Thirty-two firms surveyed sent an average of three employees each to receive training in management and organizational theory this year. Of these firms, 94 percent were satisfied with the courses, a two percent increase compared with last year.[23]

Eighty-eight percent (28 firms) stated that they implemented some or all of the ideas presented in the training session, and all firms (100 percent) would recommend the same course to other firms. Firms in HEIA and ALEB both found the classes on human

[22] However, some technical programs are considerably more expensive. This year's Food Safety Auditing course with Moody International costs LE 2500.
[23] See Appendix II Table 2.5.

resource management to be particularly informative, and ALEB clients additionally noted that the courses on financial management for executives and family business management were very useful. Those firms who had begun to participate in the management certificate program co-sponsored with AUC were also very satisfied with the program.[24]

Marketing and Sales Training

Twenty-seven firms sent an average of two employees each to receive training in marketing and sales this year. Of these firms, 96 percent (26 of 27) stated that they were satisfied with the training, and the same 96 percent would recommend that other firms take the same course. Twenty-six of the 27 firms also reported that they had implemented some or all of the ideas that they had learned.[25]

Firms noted that courses in pricing, packaging for international markets, international marketing strategies, market entry strategies, and researching foreign markets were particularly useful.

Study tours

ALEB and HEIA organize national and international study tours for local producers and exporters. Study tours aim to introduce firms to new methods of production and marketing through exposure to companies who have instituted efficient and profitable systems of production and sales.

ALEB organizes study tours for food company representatives to attend various trade fairs and expositions as well as tours involving technical training overseas.[26] HEIA sponsors international and local study tours for producers and exporters. Members contribute LE 5000 to the cost of study tours in Europe, Asia, or Africa, and LE 8000 for tours in the US and Latin America.[27]

Thirty-five percent of HEIA and ALEB clients surveyed participated in either a domestic or international study tour. Of these firms, 95 percent stated that they were satisfied or very satisfied, and all would recommend the study tours to other firms. This is a significant jump in satisfaction ratings over last year, in which 79 percent were satisfied and 88 percent would recommend Partner study tours to others. Satisfied firms stated that study tours had exposed them to advanced methods of production and marketing strategies and supplied them with new contacts including buyers, suppliers, and exporters.[28]

[24] The Management Certificate Program began this year with AUC, and approximately 40 individuals are anticipated to complete the program in 2004. Four certificates are possible: export management (which has the largest interest); export finance management; OHRD management; and production and operations management.
[25] See Appendix II Table 2.6
[26] ALEB has conducted 11 study tours in 2004 in the U S and Europe.
[27] DTII covers the remainder of the cost, which varies by location and number of days.
[28] Exposed them to new production techniques: 71 percent; new marketing strategies: 33 percent; new contacts: 26 percent.

MARKETING SERVICES

ExpoLink, ALEB, and HEIA provide a wide variety of marketing services aimed at assisting firms to enter new markets, make new sales, and promote the firms' products and services locally and abroad. These services fall under four major activities: providing market information, corporate image building, matchmaking, and trade fairs.

In the 2003 CSR, firms noted that they were satisfied with the marketing services that they had received, but requested that Partners increase the number and variety of services offered. Partners have responded to this recommendation by introducing new services and increasing efforts to inform clients of the marketing services available.[29] Seventy-three percent of firms reported that they had received one or more marketing service this year—an increase of 13 percent over 2003.[30]

SATISFACTION RATINGS

Satisfaction with marketing services overall continue to be slightly lower than technical assistance and training programs. However, satisfaction ratings concerning marketing have increased eight percent over last year, to 78 percent.[31] Further discussed below, comments critical of marketing services largely concern market information.

<u>Market information</u>

In response to member requests for more market information, ExpoLink developed a new market intelligence unit in the past year.[32] ALEB as well as ExpoLink provide their clients with market information in the form of market intelligence reports, Industry Rapid Analyses (IRAs), market correspondents in Europe, access to databases of target markets, directories of importers, and additional market intelligence publications such as Market Updates; Situation & Outlook Reports; and Special Opportunity Focus Reports.

Eighty percent of firms reported that they had utilized one or more sources of market information provided by Partners. While this is a significant increase over 2003 (where

[29] For example, ALEB and HEIA began to sponsor clients in trade fairs as exhibitors as well as observers this year. Further discussed below, ALEB worked individually with each firm with their labeling, packaging, and collateral materials prior to trade fair attendance. Additionally, ExpoLink and HEIA have significantly increased their pre-trade fair training, which is highly appreciated by member firms. ExpoLink also developed a new market intelligence unit in the past year to provide market analysis and price information to members, and ExpoLink sponsored its first annual Furniture exhibition, Furnex, in 2004.

[30] 77 percent of all ALEB clients had used a marketing service, 85 percent of ExpoLink, and 55 percent of HEIA.

[31] As noted above, technical assistance and training received satisfaction rates of 93 and 89 percent respectively.

32 Thus far, ExpoLink's relatively new market intelligence unit has issued a study on the furniture industry in the EU market, as well as a study on market opportunities for Egyptian apparel exporters following EU enlargement. The unit furthermore published a qualitative analysis of the IT market in Saudi Arabia, and provided marble and granite clients with laws, regulations, and buyers contacts for the US and UAE markets.

53 percent stated that they used Partner market information), overall satisfaction ratings have dipped slightly. Sixty-nine percent of market information recipients were satisfied with the quality and content, and 82 percent noted that they would recommend the market information to other firms.[33] In 2003, 72 percent were satisfied, and 88 percent would recommend the information to others.

As with findings in 2003, smaller firms were on average more satisfied than their medium and large counterparts, and tended to rely more heavily on Partner data. Many larger firms have in-house staff dedicated to market research, and pay for market information on the internet and from specialized research firms. These larger businesses largely consider Partners' market information to be too basic for their needs.

For satisfied clients, certain types of market information are considered particularly useful. Information about export opportunities in new markets were the most utilized type of information for businesses, followed by information on product prices.[34] A number of members of ExpoLink also made extensive use of the exporter directories that the association distributes to members.

Satisfied firms noted that this type of information, when accompanied with in-depth market analyses, has assisted them to enter new markets, make new sales, and develop new product lines. For example, following an ALEB produced Market Pulse Egypt (MPE) News Update on innovative alternatives to soft drinks, three juice processors reported launching new products aimed at the US market. Firms also reported referencing wholesale price updates when determining how to price their products, particularly prior to trade show attendance.

In addition to highlighting what types of market information were most useful, firms also discussed where Partners could further enhance market information services. The three most frequent recommendations were for Partners to ensure that particular types of information (such as potential client lists) be more accurate; that the information be less general (more specialized); and that the information be more up-to-date.[35]

Corporate Image Building

ExpoLink and ALEB both provide corporate image building services. ExpoLink assists members to produce promotional materials such as printed corporate identity packages, brochures, and CD-ROMs through companies contracted by ExpoLink. The promotional materials are designed to be used in trade fairs and marketing campaigns, and range in cost from 800 LE for 1000 copies of an insert flyer to 10,000 LE for 1,000 twenty-page catalogues. In 2004, ExpoLink completed 16 major corporate image building projects, and 27 percent of ExpoLink clients reported having received some assistance in

[33] See Appendix II Tables 2.7 and 2.8.
[34] For example, ALEB's Market Pulse Egypt (MPE) provides wholesale prices for selected clusters at four ports in the EU that are distributed to clients in hard and soft copies and made available on the internet on a monthly basis.
[35] Of the 45 firms who provided recommendations for improving market information services, 28 percent commented on the accuracy of market information (largely related to client lists), 26 percent noted the need for more specialized information, and 17 percent requested more up-to-date data.

producing promotional materials. These clients reported paying an average of LE 6,300 for the products.[36]

ALEB assists firms to develop high quality collateral materials, including company brochures and product flyers, largely in conjunction with its marketing study tours to trade fairs. ALEB works with firms to give expert input on the design and content of collateral materials, and then refers clients to ExpoLink to assist in the actual production of the materials. Eight of ALEB's clients in the CSR reported receiving assistance in developing promotional materials this year.

Ninety-three percent of firms who received assistance in corporate image building were satisfied.[37] Firms observed that these materials were effective promotional tools to buyers and exporters, and that the quality of the finished product was attractive and professional. Additionally, all firms (100 percent) who received these services would recommend the service to others.[38]

Matchmaking

ALEB and ExpoLink both provide matchmaking services to their clients.[39] Through its Strategic Alliance Services sector (SAS), ALEB identifies strategic linkage opportunities and provides firms with the necessary skills to form an alliance. For example, ALEB held its first ever promotional breakfast during the 2004 Winter Fancy Food Show in San Francisco which was attended by leading West Coast importers and the press. Following this event, ALEB worked with the Egyptian Consulate in San Francisco to organize a number of matchmaking meetings between Egyptian food processors and US importers. In total, ALEB has assisted 43 processors with 126 direct linkages to importers this year.[40]

ExpoLink organizes both "inward" and "outward" trade missions.[41] "Outward" missions are designed to introduce exporters to specific segments of the international market. "Inward" trade missions invite international buyers to Egypt in order for them to inspect local products and explore the potential for mutually beneficial trade agreements.[42] ExpoLink's most significant trade mission this year was its first annual Furnex trade exhibition held in June 2004. Over 140 companies exhibited, and participating firms have estimated a total of $60,000,000 in new sales.[43] In order to showcase the best Egyptian furniture available and to encourage international importers to attend Furnex

[36] Given the relatively high cost of these promotional materials, SME members largely do not take advantage of this service. However, as noted above, those firms who did take advantage of the service justify the cost as critical to their marketing efforts.
[37] See Appendix II Table 2.9
[38] See Appendix II Table 2.10
[39] HEIA indirectly provides matchmaking services through networking opportunities among HEIA members. It is not, however, in their SOW to offer matchmaking services.
[40] ALEB, Strategic Alliance/Market Linkages table, August 2004.
[41] ExpoLink also utilizes market correspondents to match up importers in their countries (currently France, Italy, and the UK) with Egyptian exporters in select industries.
[42] ExpoLink has completed three outward missions and 10 inward missions this year involving a total of 73 participants.
[43] Egyptian Exporters Association (ExpoLink) Final Evaluation, October 2004.

2004, ExpoLink organized four outward trade missions to London, Dublin, Milan, and Scandinavia prior to the event. Approximately 40 importers attended Furnex as a result of these outward trade missions.

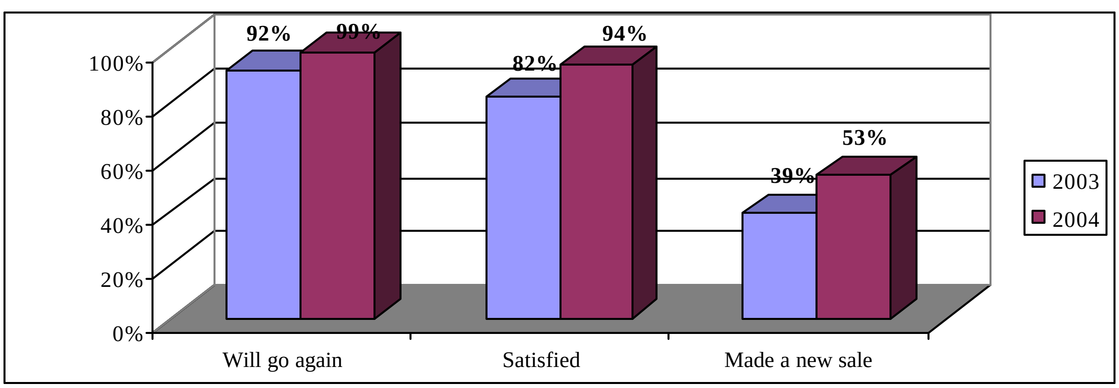
Close to one third of ALEB and ExpoLink clients surveyed received matchmaking services (31 percent). Of these firms, 89 percent stated that they were satisfied, a nine point increase over 2003 ratings. Furthermore, an overwhelming 98 percent of clients would recommend Partners' matchmaking services to other firms.

Trade fairs

ExpoLink, ALEB, and HEIA all participate in trade fairs. ALEB and HEIA largely send firms as observers, while ExpoLink sends members as observers as well as exhibitors.[44] ExpoLink's trade fair packages include marketing campaigns and construction of pavilions for trade fair exhibitors, and exhibitors pay fifty percent of total trade fair costs.[45] ALEB and HEIA often incorporate trade fair visits as part of a study tour package, and trade fair observers pay for their meals and incidental expenses. In the past year, 40 percent of firms attended a trade fair either as an exhibitor or as an observer.

Shown in the graph below, rates of satisfaction and the reported results of the trade fairs have increased even further this year. Firms noted that trade fair participation has greatly increased their knowledge of foreign markets, introduced them to new product lines and production techniques, provided them with new contacts, and helped to promote a positive image of Egyptian products abroad.[46] Indeed, firms reported that they had made an average of ten contacts each that were followed up by telephone calls, emails, or business deals.

Figure 2.13: Firms Assessment of Trade Fairs, 2003 and 2004



[44] While it has traditionally been the exclusive role of ExpoLink to send firms as observers, ALEB sent firms for the first time as exhibitors in cooperation with ExpoLink to the Winter Fancy Foods show. This event elicited the highest satisfaction ratings of any trade fair/study tour ever sponsored by ALEB.
[45] Observers and graduates of ExpoLink pay 100 percent of trade fair costs.
[46] Increased their knowledge of foreign markets: 49 percent; introduced them to new product lines and production techniques: 49 percent; provided them with new contacts: 55 percent; and helped to promote a positive image of Egyptian products abroad: 7 percent.

Trade fair participants also commented on the benefits of the pre-trade fair preparation that they received this year. In the 2003 CSR, only one third of trade fair participants had received training prior to attending. Seventy-six percent of those who did *not* receive training requested that Partners provide training in the future. Partners were responsive to client recommendations. In 2004, 81 percent of firms received pre-trade fair training and preparation, and 95 percent of these firms noted that the sessions were helpful.[47] Clients particularly lauded training sessions that provided information on the market preferences of the country to be visited, customer relations (including negotiation strategies, presentation techniques, how to close a deal, and cultural differences), effective methods of exhibiting products (including packaging, labeling, and brochures), and the general orientation sessions.[48]

Of the 15 firms who did not receive training, ten (67 percent) stated that they preferred to have training before the trade fair in the future.[49] Eight of the ten firms who requested pre-trade fair training wished to have more information on the market demands of the country visited, and seven requested more information on customer relations and sales techniques.

Follow-up assistance after trade fair participation is also considered important to client firms. Firms reported that assistance in pursuing sales leads and Partners' advice concerning how to modify packaging and labeling based on observations made at the trade fairs were particularly helpful to making inroads into foreign markets.

POLICY ADVOCACY

ExpoLink and HEIA both engage in policy advocacy with the Egyptian government. Through presentations, conferences, general assembly and board meetings, they aim to identify the policy, legal, and regulatory barriers to trade and provide these concerns as well as proposed solutions to decision makers. ExpoLink and HEIA's policy agendas focus on efforts to reduce direct and indirect taxes on exports, restructure customs rates, simplify import procedures, promote trade liberalization, and propose export incentive policies.

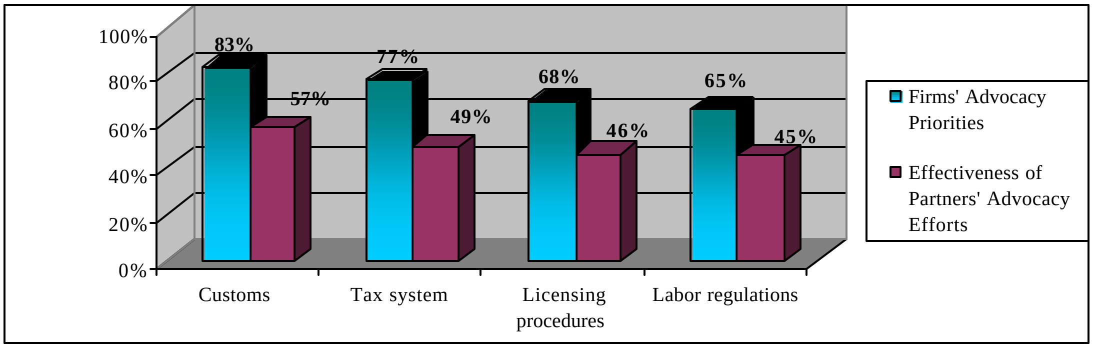
ASSESSMENT OF ADVOCACY EFFORTS

Clients have become more informed about Partner advocacy efforts in 2004, and firms report that Partners' advocacy efforts are largely targeting those policy areas that firms consider most important. The majority of businesses emphasized customs as the area most in need of significant reform, and more than half of clients interviewed consider Partners' advocacy efforts in customs to have been effective.[50] Within customs, firms

[47] See Appendix II Tables 2.12 and 2.13
[48] Customer relations: 48 percent; overall orientation: 46 percent; market preferences of the country: 24 percent; designing the exhibits: 24 percent.
[49] See Appendix II Table 2.14.
[50] The ordinal ranking of policy priorities did not change from last year, with concern over customs followed by tax regulations, licensing procedures, and labor regulations.

reported that the greatest obstacles to importing goods were customs clearance procedures, followed by GOEIC inspections.[51]

Figure 2.14: Effectiveness of Partner Efforts to Address Firms' Advocacy Priorities



CAIRO AIRPORT PERISHABLES TERMINAL

In July 2003, HEIA and the Egyptian Airport Authority inaugurated Egypt's first refrigerated facility for the export and import of perishables by air. The Refrigerated Perishable Terminal (RPT), located at the Cairo International Airport, has a daily capacity of 180 tons of perishable goods and covers a total area of 24,000 m2. "Owned by HEIA, operated by Egypt Air, and powered by Lufthansa Cargo," the facility is a creative example of a public/private partnership for mutual benefit.[52] During its first year of operations, HEIA members had exported close to 40,000 tons through the perishables terminal, utilizing 41 foreign air carriers.

Twenty-eight percent of CSR respondents export fresh horticultural produce, and of these firms, 62 percent have used the new perishables terminal. The remaining exporters use sea freight rather than air due to cheaper costs and/or greater space availability compared with air shipments.

Eighty-five percent of the users of the perishables terminal reported that they were satisfied with the terminal. The majority of respondents noted that the quality of their exports had improved, and more than a quarter stated that the management of the facility was efficient.[53]

Exporters did have several recommendations to improve the terminal. Forty percent of users recommended that staff receive additional training, and forty percent also recommended that management make the process of transferring the produce from the terminal to the plane more efficient and better organized. One quarter of firms requested

[51] Customs clearance: 39 percent of firms; GOEIC inspections: 27 percent; appeal/arbitration mechanisms: 14 percent; how brokers are licensed: 12 percent.

52 HEIA also pays staff salaries and rent of the land. Lufthansa Cargo set up the RPT operational manual and its quality management system according to ISO 9000 specifications. Lufthansa experts are also responsible for RPT staff training.

[53] Quality of produce improved: 67 percent; management efficient: 29 percent.

that the terminal space be increased, and one fifth suggested that paperwork procedures would be more efficient if all paperwork offices were in one central location.

CONCLUSION: RESPONDENTS' PERCEIVED NEEDS AND SUGGESTIONS

In addition to service-specific suggestions noted by clients in this chapter, firms had several overarching recommendations to improve service provision. These recommendations are an aggregation of general assessments, needs, critiques, and suggestions made by businesses concerning Partners' overall approach to service delivery.

BUSINESSES' SUGGESTION: INCREASE ACCESS TO HIGH-QUALITY, TAILORED TECHNICAL INFORMATION

In the 2003 CSR, firms suggested that Partners offer more firm-specific assistance in the form of increased on-site consultant visits and tailored, hands-on workshops. Partners did respond to these recommendations by offering a larger number of advanced-level courses and by incorporating more field trips in their technical programming. Firms this year, while noting the enhancements made, offered further suggestions on how to increase clients' access to available technical services offered, and how to make services more responsive to their needs.

- <u>Enhance access to technical services: consultant visits</u>
  As with last year, firms who had received on-site consultants requested more visits, and many smaller firms who had not received on-site visits requested them. Firms in particular noted that consultants should stay for a longer period of time to be able to visit a larger number of companies. Firms also requested that Partners compile a list of local consultants (including qualified engineers) who are available for short-term hire.

- <u>Enhance access to technical services: technical training courses</u>
  In relation to training courses, firms requested that more workshops be offered in the evenings, and that the number of training courses (particularly export management and on-site training for skilled workers) increase.[54] A number of firms also recommended that HEIA and/or ExpoLink establish a formal training center.[55]

- <u>Provide follow-up technical assistance</u>
  Firms once again requested follow-up assistance in implementing what they had learned during consultant visits and workshops. Requests for follow-up came in three forms: some firms wanted the consultant to return after a reasonable period

[54] Partners have traditionally faced difficulties in offering evening trainings, as budgets are limited to pay staff overtime to work in the evenings. However, firms' access to training is constrained due to their limited availability to attend during office hours, and Partners may want to explore options for how to increase evening sessions.
[55] In HEIA's new headquarters in 6th of October, an area has been designated as a training center.

to see if companies were correctly carrying out suggestions; other firms wanted more advanced-level workshops in technical areas once they had completed more basic courses; and finally some requested that Partners themselves contact firms following technical assistance and training to see what progress had been made and what additional assistance they required.

- Increase the number and topics of demand-driven workshops
  Recognizing that Partners are limited in the degree to which they can offer one-on-one counseling to all clients, several firms suggested that Partners offer more tailored workshops in which firms are pre-screened by size, sector, or any other relevant category, and that trainers tailor the courses to address commonly-shared issues.[56] As firms noted last year, these types of workshops are more demand-driven, directly respond to firm needs, and enable many firms who likely share similar problems to benefit from the information.

- Increase the number of hands-on, practical (as opposed to theoretical) courses
  Finally, firms commended the new courses that had been introduced with more hands-on, practical components, and requested that this type of training be offered more frequently. For example, field trips to modern farms or factories were repeatedly highlighted as the most beneficial type of training, with firms noting that this type of information sharing demonstrated how firms could apply new techniques in their own firms and farms, and illustrated the potential benefits of doing so.

BUSINESSES' SUGGESTION: PROVIDE HIGHER-QUALITY MARKET INFORMATION AND INCREASE MATCHMAKING ASSISTANCE

As with the 2003 CSR, while the majority of clients stated that they were satisfied, marketing services ranked the lowest in overall satisfaction compared with technical assistance and training. Firms continued to focus on market information this year, and additionally discussed the importance of matchmaking assistance.

- Provide more in-depth, up-to-date market intelligence
  Thirty three percent more firms are using market information this year compared with last year, but satisfaction with the service has not improved because of firms' perceptions that the information is too basic and not current. Over half of the firms who had used market intelligence services stated that they needed more in-depth and up-to-date market information. Firms also requested more market intelligence concerning new markets in the MENA region, COMESA, and East Asia.[57]

[56] Firms that requested specialized courses by sub-sector generally referred to technical courses in production and product improvement. Firms that focused on size issues generally referred to courses in management and sales.
[57] COMESA=Common Market for Eastern and Southern Africa.

- Increase matchmaking services
  Firms were highly satisfied with Partners' matchmaking efforts this year, particularly the increased possibilities of exhibiting at trade fairs, enhanced inward buying missions (especially the Furnex exhibition), and new pre-trade fair counseling on packaging and sales strategies. Firms requested that Partners continue to offer more opportunities to market their products both locally and abroad.[58]

BUSINESSES' SUGGESTION: IMPROVE CLIENT-PARTNER COMMUNICATIONS TO MAKE SERVICES MORE DEMAND-DRIVEN

Firms indicated that communication between themselves and Partners continues to improve. However, clients repeated last year's requests to enhance bi-directional communication, both in terms of Partner outreach as well as acquiring client feedback.

In terms of Partner outreach, clients again requested more information from Partners on the types of services offered. Several firms suggested that information on services be disseminated in a more timely manner, on a more regular basis, and through email rather than fax.[59] A number of firms also requested that the information be in Arabic rather than in English. Furthermore, Partner websites may be more effectively employed in publicizing what services are available and how to participate. Currently, while these websites do (to varying degrees) inform readers of training and trade fair events, none provides a way to register online and not all sites enable users to request additional service-specific information.[60]

Clients additionally indicated that they wanted to provide feedback following service provision, as well as feedback about their unmet needs and new ways in which Partners could be of assistance. Clients this year observed that Partners had increased efforts to follow up on firms' opinions concerning services, but there continues to be the perception that this follow up is not systematic either in collecting information or in using this information to inform management programming decisions. A number of firms suggested that Partner websites offer feedback forms or "contact us" pages to facilitate client-Partner communication.[61]

58 ExpoLink is planning to use its website as a new matchmaking service. Under "buyer links" and "exporter links," firms will be able to log on and make new business contacts, but this is not yet operational.

59 This recommendation was largely from ALEB and ExpoLink clients. It appears that a number of HEIA members do not regularly use email, although this is an issue that should be further explored by Partners.

60 All Partners do have a "Contact Us" link, but clients reported low response rates to requests through this link, and some Partners indicated that the link is rarely utilized to request information about services. With greater details of services offered on the website, it may be more useful to have separate "contact us for more information" links with each service. This could then be directed to the specific person in charge of that service, rather than to a central repository as it is normally handled (ALEB does this with the training web page).

61 As noted above, Partners do offer "contact us" links, and ExpoLink and ALEB have profiles of their staff. Partners may need to strategize with clients on how to better publicize their websites—a key source of information.

Firms also requested staff-specific information on exactly who they could contact within the organization to discuss a particular service.

SMALL AND MEDIUM BUSINESSES' SUGGESTIONS

Firms of varying sizes naturally require different types of services. The CSR team noted that smaller firms often registered different types of recommendations compared with larger companies. Helping these SMEs is important for Partner sustainability (i.e. ExpoLink and HEIA), as it offers opportunities for building up a base of future clients for Partner services, while also generating new and increased Egyptian exports. These recommendations include the following:

- Ensure equal access to services.
  Smaller firms in particular are under the impression that they do not always have equal access to all services. While these firms recognize that they often cannot afford to attend study tours, trade fairs, and other high cost services, they do see the value of such activities and want to participate. Firms therefore requested that Partners offer more in-country study tours and inward buying missions that smaller firms would benefit from, and which they can more easily afford.

- Offer technical information through a number of formats
  A number of smaller firms requested that technical information (particularly concerning GAP and HACCP) that is used during training sessions and technical visits be made available in hard copy, through CDs, or through training videos that can be shown to skilled workers on-site.[62]

- Offer marketing services tailored to smaller firms
  While larger companies noted that market analysis was at times too general, some smaller firms requested more assistance in understanding how to utilize even the most basic market intelligence offered.[63] Training courses in market analysis and marketing planning may be appropriate options for such firms. Furthermore, smaller farmer members of HEIA in particular requested assistance in negotiating purchase contracts with input providers as well as sales contracts with exporters.[64]

- Reduce membership fees
  One of the most common requests from smaller members of ExpoLink and HEIA was to reduce the annual membership fees, which are considered prohibitively expensive by some of the smaller firms.

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[62] HEIA began to sell such CDs in 2003, but given the frequency of this request, it appears that a number of firms do not yet know about this service.

63 This does put Partners in the difficult position of being requested for more advanced market information from one set of clients, and for more help in understanding how to use basic market data from another set of clients.

[64] Specifically, these farms noted that they were in a weak negotiating position when it came to dealing with larger firms, and that they wanted assistance in purchasing inputs in bulk to lower per-unit cost, as well as assistance in selling their produce to reach more favorable terms with exporters.

CHAPTER THREE: ASSOCIATION ASSESSMENT

INTRODUCTION

As part of its economic growth strategy, USAID provides technical and financial assistance to trade and business associations. These associations offer marketing and technical information and other services to their members with the aim of assisting member firms to compete in the global marketplace. ALEB supports business and trade associations through trainings, workshops, study tours, and tailored technical assistance packages.[65] With the upcoming closure of ALEB at the end of 2004, ALEB has particularly focused assistance this year on preparing these associations to be the "legacy" institutions capable of carrying on many of ALEB's services in the future.

This chapter examines those associations that have received technical assistance from ALEB, which includes HEIA and ExpoLink, who are also USAID Partners.[66] The chapter explores associations' views of the organizational development, strategic planning, and service delivery services offered by ALEB in 2004, and measures associations' satisfaction with the services they have received. Because ALEB has begun the process of closing down their activities, this chapter also includes a brief analysis of sustainability post-ALEB. It explores what services client associations are currently providing to their members, and their potential to function and grow once the project closes. The chapter concludes with overall findings and associations' recommendations to enhance association services.

PROFILE OF ASSOCIATIONS RECEIVING USAID SERVICES

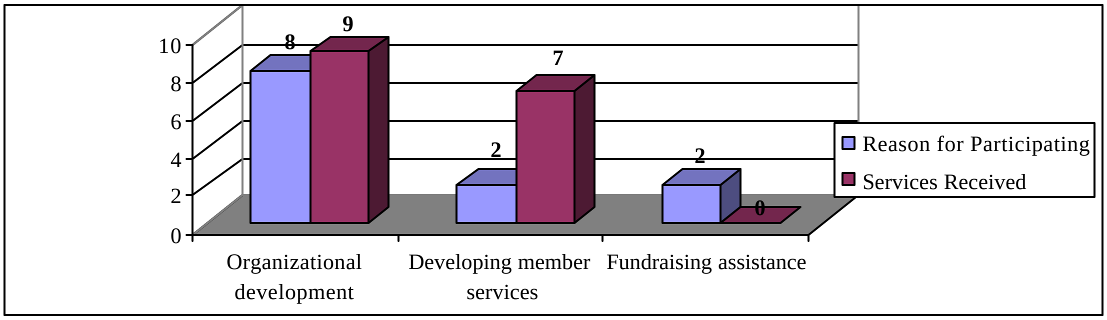
The CSR sample interviewed 10 business and trade associations in greater Cairo and Alexandria.[67] In the CSR sample, business associations have an average of 496 members, are located in the metropolitan areas of Cairo and Alexandria, and are on average seven years old.[68] Associations have received services from ALEB for an average of almost two years.[69]

Most associations began to work with ALEB in order to receive technical assistance in organizing the association, which included developing mission statements, strategic action plans, rules of governance, etc. *No* associations began working with ALEB in

[65] In this chapter, the terms "business associations" and "trade associations" are used interchangeably.
[66] HEIA and ExpoLink are both grant recipients from USAID, and have received varying types of technical support from ALEB, including staff training and collaboration in providing services to members such as trade fairs and buying missions.
[67] Because of the interest in sustainability with the upcoming closure of ALEB, this year the CSR only interviewed those business associations considered "active" recipients of ALEB assistance. This means that these associations have received a combination of both training as well as technical assistance, and have demonstrated an ongoing commitment to improvement.
[68] See Appendix III, Tables 3.1 and 3.2.
[69] See Appendix III, Table 3.3.

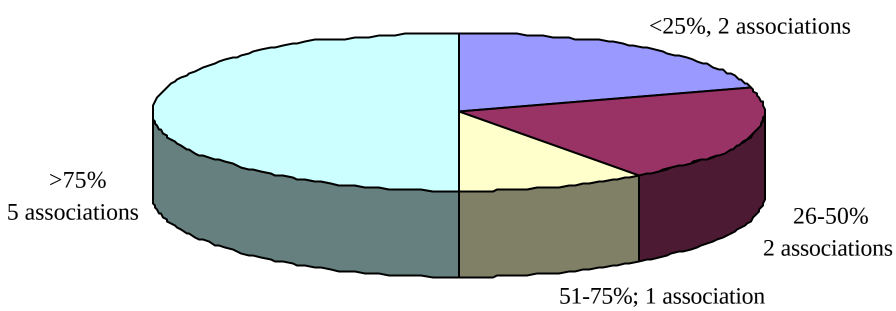
order to receive assistance to register their association; to market their members' products; or to learn how to advocate on behalf of their members.[70] Shown below, ALEB has largely responded to member needs by providing most with assistance in organizational development and providing services to association members.[71] This year, however, no association received fundraising assistance.

Figure 3.1: Reasons for Working with ALEB



Shown in the chart below, associations espouse relatively participatory principles. In six (of the 10) associations, the majority of members have the right to vote at general assembly meetings. Additionally, half of the associations have members who volunteer their time to assist in association activities. These five associations report that in the past year, an average of 18 members worked on a voluntary basis for each association.

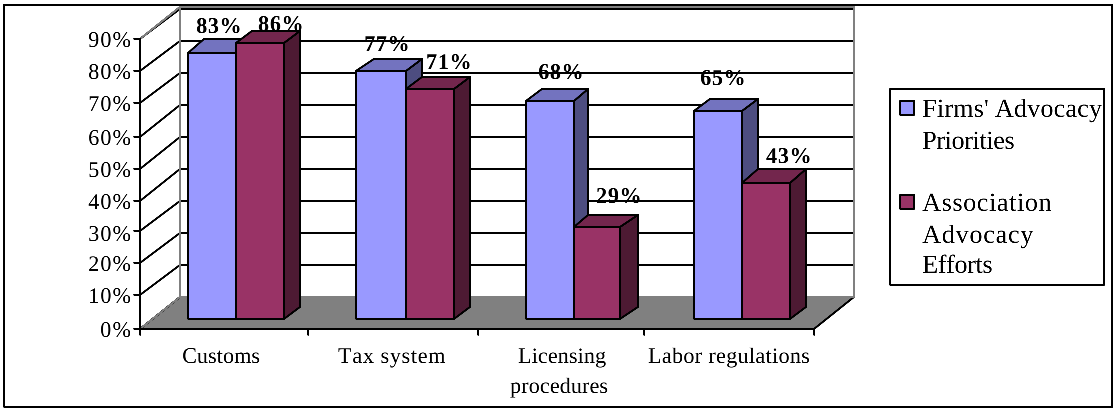
Figure 3.2: Percentage of Members with the Right to Vote at GA Meetings



Seven associations report that they advocate to the government on policy issues of importance to their members. The majority of associations focus on reforms within the customs and tax systems, both of which are priorities of businesses interviewed. Licensing procedures and labor regulations receive less attention by associations.

[70] While no associations reported having begun to work with ALEB to receive assistance to register their organization, ALEB did provide a significant amount of assistance to two associations (EgSAE and ESHEDA) to register themselves.
[71] See Appendix III, Table 3.6.

Figure 3.3: Advocacy Priorities of Firms, Compared with Association Advocacy Efforts



OVERALL SATISFACTION AND IMPACT

Nine of the ten associations (90 percent) stated that they were satisfied or very satisfied with ALEB services, a significant increase over last year (where 74 percent were satisfied).[72] Associations assessed that assistance has led to significant improvements in the capacity of associations to deliver services to their members, to increase member enrollment, and to generate revenue. All associations would recommend ALEB's services to others.

<u>Service Delivery to Members</u>

Seventy-five percent of respondents noted that their associations had increased the number of services they offer, adding an average of eight *new* services for members over the past year.[73]

<u>Member Enrollment</u>

All ten associations reported that their memberships increased in the past year, with an average of 50 new members per association.

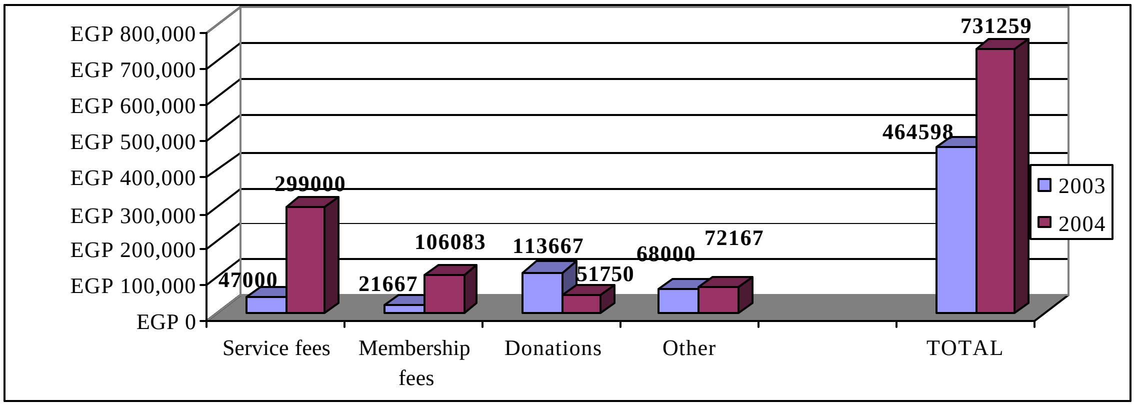
<u>Revenue</u>

In 2003, the average income of these associations was LE 464,598. In 2004, average income has increased to LE 731,259—a 57 percent increase over last year. Shown below, the largest increases in association revenue came from fees charged for services and for annual membership dues (and as discussed above, the number of new services and member enrollment have both increased in the past year).

72 However, it is important to note that the sample population in the 2004 survey does not have the same characteristics as that of 2003. As noted in the footnote above, this year's associations were explicitly selected due to their active participation in ALEB activities and their strong commitment to improvement. Last year, all associations were surveyed, regardless of whether they had only attended one training session and nothing more, or whether they had received the entire package of association services, from training to one-on-one technical assistance. It therefore stands to reason that satisfaction ratings this year would be higher, given their more intensive involvement with ALEB.

73 Eight associations responded to this question. See Appendix III Tables 3.7 and 3.8.

Figure 3.4: Average Association Revenues, 2003-2004



SERVICES

Through its Trade Association and Strategic Alliance Sector, ALEB provides training and technical assistance to business associations in matters related to organizational development, fund-raising, strategic planning, service delivery, and policy advocacy. This year, ALEB offered six courses in proposal writing, communication skills, organizing trade shows and conferences, advocacy, and strategic planning and management, and provided technical consultations to all ten associations.[74]

ORGANIZATIONAL DEVELOPMENT & STRATEGIC PLANNING

ALEB works with associations to establish their organizational purpose, vision, and goals, and to develop strategies and objectives that will enable their achievement. Nine (of the ten) associations received assistance in organizational development and strategic planning; three attended a training session, and the remaining six worked one-on-one with ALEB staff and consultants.[75] All of these associations implemented at least some of the ideas that they had learned from ALEB, and all of them would recommend strategic planning assistance to other associations.[76]

One-hundred percent of participants were satisfied, noting that these services had improved their abilities to devise, and revise, their associations' activities and plans in reference to the mission statement, goals, and objectives already developed with ALEB assistance.[77] For example, following a workshop on strategic planning organized by ALEB, ESPTA board members refined the association's mission statement, goals, and objectives, and then brainstormed new activities to met the sector's needs. In order to

[74] In addition to these association-specific courses, association management and staff are also invited to attend all other training programs that ALEB conducts, including marketing, food processing technology, quality standards, etc. According to ALEB training rosters, many association staff take advantage of these courses as well. Because ALEB's technical and marketing courses were discussed in Chapter two, this chapter focuses on those training sessions specifically targeting association leadership, management, and staff.

[75] See Appendix III Table 3.10.

[76] See Appendix III Table 3.11.

[77] See Appendix III Table 3.12.

increase the association's transparency and encourage member involvement, ESPTA also selected new board members. According to ESPTA leadership, following this organizational development assistance, the association was able to attract new corporate members, increasing their revenues through additional membership dues.

SERVICE DELIVERY

Strengthening member services is a precondition for the success and sustainability of business associations. ALEB assists business association management and staff to deliver services through courses and one-on-one consultations. Through Partner-association collaboration, ALEB expects associations to "learn by doing," ultimately gaining the capacity to provide these technical services to members without ALEB's support in the future.

Seven associations received assistance developing services for members, the majority of whom worked on a one-on-one basis with ALEB staff and consultants. ALEB tailored the assistance to match the requests and needs of the association. For example, ALEB and HEIA worked together to strategize how HEIA would continue to provide post-harvest technical assistance independent of ALEB, and HEIA has now moved to focus more on using local consultants to serve members. These local consultants, most of whom have worked with foreign consultants previously, are more cost effective than their foreign counterparts, and according to some ALEB and HEIA clients, are at times more aware of local growing conditions and constraints than are non-Egyptian experts. As a second example, at the request of CFI, ALEB assessed the training needs of its staff members, and designed and facilitated a series of training sessions based on the needs assessment. Following training sessions in communication and marketing skills, CFI developed a new matchmaking service to assist members enter into new markets, and also established a public relations department to improve member-association relations.

All of these associations reported that they were satisfied with the support that they had received, and all would recommend this service to other associations.[78] Associations noted that it was particularly helpful to work with ALEB directly in providing services to their members. By "learning by doing," these associations are more confident of their own abilities to continue to deliver services post-ALEB.[79]

WEBSITE DEVELOPMENT

ALEB worked with half of the associations to develop their websites.[80] Four (of the five) associations now have functioning websites due to ALEB assistance, and all would recommend this technical assistance to other associations. However, two associations stated that they were not satisfied, noting that there had been no follow-up assistance, and that the association had been left alone to deal with problems encountered in their sites. These associations now work with an IT solutions company to meet their ongoing requests as needed.

[78] See Appendix III, Tables 3.4 and 3.5.
[79] Association capacity and sustainability are further explored in the following section.
[80] See Appendix III, Tables 3.13 and 3.14.

ASSESSMENT OF ASSOCIATIONS' CURRENT CAPACITY: IMPLICATIONS FOR SUSTAINABILITY POST-ALEB

SERVICES OFFERED TO MEMBERS

Associations assisted by ALEB provide a number of services to their members, many of them without financial or technical support from ALEB. The following section details the activities of associations targeted as potential "legacy" organizations by ALEB, and summarizes their self-reported assessments of their capacity to carry on these activities without ALEB support. Such an (albeit subjective) assessment provides an indication of where these associations stand today, what they may or may not be able to offer in the near future, and what businesses may be able to expect from their associations with the end of ALEB.[81]

Technical Consultants

Four associations currently provide technical consultants to their members; two with ALEB's assistance, and two without. The two associations that receive support from ALEB report that, in the future, they will be able to provide TA to their members without receiving outside technical or financial support. However, these associations are not *currently* able to do so independently, as they have both offered this service for less than six months.

There does appear to be an ongoing demand on the part of members for technical consultants, as the two associations who provided consultants with ALEB's assistance served an average of 52 members each, all of whom paid a fee for the visit. All four associations who currently offer consultants plan to continue to do so in the future. However, all of them stated that they will need financial assistance, and three of the four stated that they will need technical assistance.

Training and Workshops

All nine respondents offer training sessions and/or workshops to their members; five of whom do so without ALEB assistance. Of the four associations who do currently work with ALEB to provide training, two assess that they will *not* be able to provide this service without ALEB's technical and financial assistance in the future. The two associations who state that they can offer training to their members in the future have both had more than a year of experience implementing training programs.

Each association has provided an average of 76 members with training, and three quarters charged a fee. All associations plan to continue to offer training sessions in the future; however, all of them also report that they will need financial assistance to do so, and seven of the nine report that they will need more technical assistance.

[81] Nine of the ten associations responded to these questions on their own activities. Thus, all numbers are out of nine respondents, rather than ten.

Study Tours

Four associations currently sponsor study tours for their members, only one of which does so with ALEB assistance. This ALEB-supported association notes that it will be able to organize study tours in the future independent of ALEB, but that it is not currently able to do so. All of the four associations plan to continue to offer study tours, but all of them assess that they need additional financial and technical support.[82] While only one association sponsors study tours with ALEB assistance, this does not, however, imply that the remaining three associations do so without any assistance. In fact, given the fact that all four report that they continue to need additional financial and technical aid, it is likely that all of these associations rely on external support to conduct study tours.

Market Information

Nearly all associations (8 of 9) provide market information to their members, all of whom do so *without* ALEB assistance. All of these associations report that they will continue to provide market information to their members, although all of them also requested more technical assistance in how to acquire and analyze relevant data.[83] Six of the eight also noted that they need financial assistance.

Matchmaking Services

Five associations offer matchmaking services to their members, all without ALEB support. All of these associations, however, report that they need financial support to assist their members to develop business contacts locally and abroad, and four of the five note that they need technical assistance.

Public Awareness Events

Four associations have organized conferences, seminars, or other public awareness events, only one of whom received assistance from ALEB. While all of the four associations plan to sponsor more such events in the future, three of them assess that they will need both financial and technical assistance in order to do so.

Advocacy

[82] While ALEB was contractually unable to conduct a study tour for associations in 2004, it did send staff members from HEIA and EEA on study tours along with food processors.

[83] ALEB dedicated a significant amount of energy to training association staff members on how to acquire, analyze, prepare, and report market information in 2002 and 2003, and the fact that most associations now do so without ALEB assistance indicates the effectiveness of this assistance. One problem that ALEB has encountered, however, is the high staff turnover of most associations, in which staff are trained and then leave the associations. This problem, further discussed below, underscores Egyptian associations' needs to develop a cadre of trained association professionals who consider association management to be a viable career path. Associations continue to request one-on-one training or technical assistance on association premises, and while ALEB could not provide this during 2004, it did encourage the associations to send their staff members to the export marketing management courses that ALEB has been conducting. EEA and FCC sent some staff members to two or three of the courses, but in general, associations did not fully take advantage of this training.

Four associations also engage in policy advocacy efforts. These associations do so without ALEB assistance, and they plan to continue to advocate on behalf of their members in the future. Two of the four report that they need financial support, and one needs additional technical support, in order to implement their advocacy plans.

OVERALL ASSESSMENT

More than half of the associations that have received assistance from ALEB currently offer a range of services to their members, and many do so without ALEB support. Most of these associations also have plans to expand and enhance service delivery as a mechanism for generating revenue and increasing membership. High-quality service delivery, coupled with relatively high rates of member involvement both in voting and volunteering, may bode well for the sustainability of these associations.

The management of every association interviewed in the CSR assesses that they will continue to function without ALEB's assistance, and nine of the ten expect their associations to *increase* their current levels of activity in the near future. Four associations currently receive no assistance from any other donors, and six associations state that they could function without any donor support by the end of this year.[84]

However, this assessment warrants a number of caveats. First, as is evident from the above responses on particular services provided, even associations who currently offer services without Partner support often note the need for more financial and technical assistance. For those who currently serve their members with no external assistance, it is unclear if their requests for additional assistance reflect a desire to enhance the quality and scope of services offered, or if they do in fact need support in order to adequately maintain existing services.

Second, it bears repeating that these assessments are from the management of the associations, and do not reflect the opinions of members concerning the content and quality of services offered. These findings are therefore based on subjective assessments that may, or may not, fully reflect the reality of these associations' capacity. Indeed, there are indications that the large majority of these associations are not yet prepared to operate without donor financial and technical support, and more in-depth research involving interviews with association members and other relevant stakeholders may be warranted.[85]

Keeping the above caveats in mind, the CSR does find that only a minority of association managers believe that they face a real prospect of having to discontinue one or more services with the closure of ALEB. While most associations did lament the departure of ALEB, most assess that they have also developed the capacity to continue to function to the benefit of members, and to also identify new sources of financial and technical

[84] Associations receive assistance from the EU, the Netherlands, Germany, the ILO, the IMC, CIDA, the NGO service center, and AmCham.
[85] See "Agricultural Trade Association Assessment," 10 August 2004; "HEIA Final Evaluation," 14 October 2004; "ExpoLink Final Evaluation," 14 October 2004.

support to assist them to further enhance services and modernize management practices. Whether or not this is the case is a question that requires further analysis beyond the scope of this report.

CONCLUSION: RESPONDENTS' PERCEIVED NEEDS AND SUGGESTIONS

ALEB has worked for the past several years with associations that have been identified as the most likely to continue providing their services once the project closes. ALEB's strategy, in addition to conducting training and technical assistance, has been to collaborate with associations to deliver necessary services, imparting practical skills to sustain association activities. Associations laud ALEB's approach to service delivery, and characterize the assistance as flexible, responsive, and informative. Associations also have suggestions to enhance particular services, which includes increasing chances for peer-based learning, expanding training topics, and enhancing service follow-up and Partner-association coordination.

ASSOCIATIONS' SUGGESTION: ENHANCE OPPORTUNITIES FOR PEER LEARNING

While associations did not participate in study tours in 2004, a number of the associations commented on the positive impact of prior study tours. They observed that study tours showed them how they could improve their operations, develop new services, and increase membership. Study tours also provided associations with the opportunity to network and make contacts with other relevant associations. Associations recommended that future USAID efforts expand opportunities for them to communicate with and learn from peer organizations. These activities could take the form of international study tours, as well as locally-held workshops bringing together Egyptian trade and business associations to share experiences and lessons learned. This type of peer learning exercise would not be an instructor-audience event, but would rather engage participants to share and learn from each other with the assistance of a moderator, imparting practical tools, new ideas, and collaborative relationships with other business organizations.

ASSOCIATIONS' SUGGESTION: INCREASE THE VARIETY AND SELECTION OF TRAINING COURSES

Associations also appreciated the training courses that were offered, and found them particularly useful when they were newer, less experienced organizations. Associations now want to participate in a wider range of training programs, particularly related to association leadership and organizational management. This suggestion is particularly important, given the ongoing need for Egypt to develop a cadre of trained association managers.[86] Potential topics highlighted by associations included: human resource management; finance and accounting; advanced strategic planning; and managing resources and choices. Additional topics offered by other association management

[86] There are very few trained professionals currently in Egypt to operate associations, and few career-oriented executives consider association management to be a long term career (see Milner, "Agricultural Trade Association Assessment," 2004).

training programs worth considering for future USAID activities (and for the EGSAE[87]) include: management skills for association executives; planning and managing organizational change; performance development and appraisal; strategies for effective problem solving and decision making; marketing strategies for associations; membership development; and time management.

However, there is a discrepancy between this suggestion on the part of the associations and ALEB's service program. ALEB has in fact offered a number of courses in the above areas (human resource management and finance and accounting, to name two) in the past, and found that very few associations had sent staff members. It is unclear why associations are now requesting courses that were offered and garnered little interest on the part of associations at the time.[88] Two possibilities are that, one, associations now recognize the value of such courses as they have matured over time, or two, that associations desire such assistance, but are unwilling to pay for it. This issue requires additional investigation.

ASSOCIATIONS' SUGGESTION: ENHANCE ASSOCIATION-PARTNER RELATIONS

Associations assisted by ALEB are clearly satisfied, and attribute significant improvements in membership, services, and association revenue to ALEB's assistance. Associations also see potential for enhanced relationships with future Partners. The most frequent recommendation was to increase follow-up of technical assistance. Associations want Partners to contact them at the conclusion of technical assistance or a training program in order to assess their progress, answer any new or follow-on questions, and assist them with any problems that have come up. Second, a few associations suggested that future activities coordinate service provision more directly with them, to avoid any redundancy or overlap, and to avoid any (unfair) competition among service providers, whereby a Partner may be able to subsidize the costs of services more than associations, and potentially draw members away from unfunded associations.

[87] Egyptian Society for Association Executives

[88] According to ALEB, all associations were informed of the training sessions through faxed invitations.

CHAPTER FOUR: SMALLHOLDER ASSESSMENT

INTRODUCTION

By 2004, AgLink and AgReform had worked with 2420 farmers in six governorates in Upper and Lower Egypt.[89] AgLink (December 1996 to January 2004) worked with cattle and buffalo smallholders, focusing on assisting clients with dairy/meat production, dairy/meat processing, and feed/farm supplies. AgReform (March 1996 to March 2004) worked with grower associations to assist farmers improve and increase production, secure contracts for export and input supply, and help them meet market demand. Interventions of both Partners addressed the entire production, processing and marketing chain of farmers' products, and their activities focused on three major objectives: technology transfer; association development; and trade development.[90]

This chapter describes client views of the technical assistance and marketing services offered by Partners, including farmers' estimates of the impact of services on production and sales as well as their satisfaction with these services. The chapter concludes with overall findings and farmers' recommendations to enhance service provision to smallholders.

PROFILE OF SMALLHOLDERS RECEIVING USAID SERVICES

The CSR sampled 130 small and medium smallholders working in the livestock and horticultural sub sectors in Fayoum, Qena, Sohag, and Minya.[91] Clients surveyed in the CSR had worked with AgReform for an average of 4.2 years, and with AgLink for an average of 2.2 years.[92]

These farmers live in households with an average of eight family members.[93] The largest proportion of AgReform clients own five or more feddans of land, while the majority of AgLink clients own three or less feddans.[94] The difference in landholding size by Partner is not surprising, given that households that rely primarily on livestock production (AgLink clients) generally utilize smaller holdings than do households that rely primarily on crop production (AgReform clients).

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[89] AgLink worked with farmers in Alexandria, Dakahleya, and Minya. AgReform worked with farmers in Fayoum, Qena, and Sohag.
[90] AgLink defined smallholders as farmers with less than six head of cattle and/or buffalo, and AgReform defined smallholders as farmers with less than five feddans of old land.
[91] In order to directly compare this year's results with those of the 2003 CSR, surveyors returned to interview the same farmers that had been interviewed in 2003. However, Because AgLink had closed their offices in Alexandria and Daqhaleya at the onset of the survey, this year's CSR only surveyed former AgLink clients in Minya.
[92] See Appendix IV Table 4.3.
[93] See Appendix IV Table 4.1.
[94] See Appendix IV Table 4.2.

Figure 4.1: AgReform Clients' Landholdings

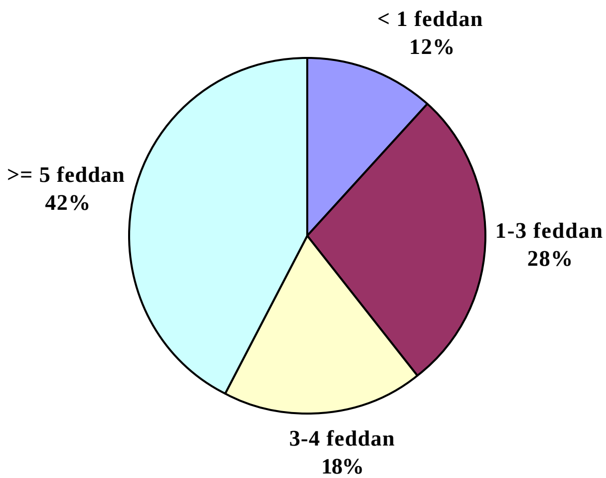
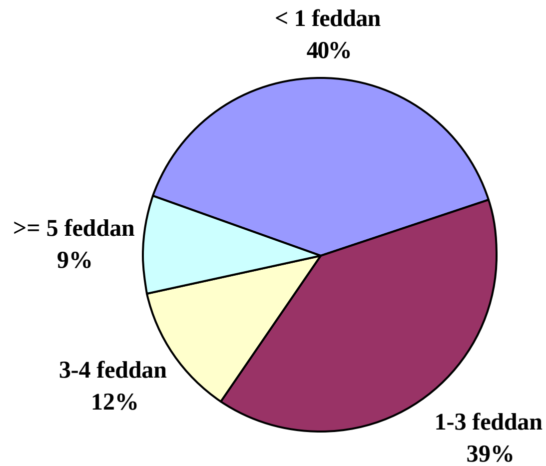


Figure 4.2: AgLink Clients' Landholdings



OVERALL SATISFACTION AND IMPACT

The large majority of farmers continue to be satisfied with Partner services, with 89 percent this year reporting that they are satisfied or very satisfied. However, this is a decrease from 2003, in which satisfaction ratings were at an astounding 99 percent. While there is no statistically significant correlation between clients who received assistance and overall levels of satisfaction this year, when disaggregated by Partner, there is a highly statistically significant correlation between AgLink clients who had received technical assistance and overall rates of satisfaction.

Farmers provided a number of reasons for why the majority continue to be satisfied, and also why some are no longer satisfied with Partner services. The preponderance of farmers—both satisfied and not—noted that service provision has decreased dramatically in the past year. This is to be expected, given the closure of AgLink and AgReform and the time required to start up operations for the new AERI activities. Satisfied farmers largely focused on the fact that Partner services had a significant impact on household income and asset holdings over the years that they had actively received services (for details, see below), and they had learned new technologies and techniques that they continued to employ independent of Partner assistance. Farmers no longer satisfied with Partners' services also attributed changes in income to Partner activities, but were not satisfied with the (albeit temporary) cessation of services. It bears noting that nearly all farmers make no distinction between the old and new projects (AgLink and AgReform versus AERI), and there is therefore no clear understanding among some for why there has been an interim shortfall in services.

Farmers also assessed the changes in household employment, income, and assets over the past year that they attributed to Partners' services.

Employment

Overall levels of employment remained relatively stable over the past year. In both 2003 and 2004, households employed an average of three full time workers and four part time workers. Seasonal labor employment crept up slightly, from an average of 33 seasonal workers in 2003 to 34 in 2004. However, this does mask the significant differences that have occurred since the *onset* of the activities. Cantaloupe cultivation requires 2.5 times as much labor as sugarcane, and green beans require three times as much. As more farmers have moved to cultivate these labor intensive, high income crops, seasonal job creation has increased significantly. According to the AgReform final evaluation, due to shifts in cropping patterns to these horticultural crops, activities of this Partner injected over one million Egyptian pounds in wages into the rural economy over the past two years.[95]

Income

Between 2003 and 2004, the average net farm income of smallholder clients increased by 20 percent, from LE 7325 to LE 8757.[96] Increased income came from higher sales to exporters as well as to local consumers. The average increase in income from exports for all farm production edged up by 3.4 percent in the past year. However, as would be expected, export values varied significantly by commodity. Farmers engaged in growing fruits and aromatic and medicinal plants witnessed significant increases in export sales, with income from fruit exports up by 50 percent, and income from aromatic and medicinal exports up from *no sales* last year to an average of LE 3050 this year. Vegetable exports did drop by six percent this year.[97]

Income from domestic sales grew by an impressive 29 percent. The largest growth was found in income from aromatic and medicinal plants, which grew by 88 percent, and dairy products, which grew by 57 percent. Income from vegetables sold in the local market increased 29 percent, while income from local fruit sales decreased 12 percent.

Consumption and Expenditures

Smallholders have utilized this extra income in a number of ways. First, household consumption of a number of commodities has increased over the past year. In particular, smallholder clients reported that they had more than doubled their vegetable consumption, and had increased consumption of dairy products by 58 percent. In total, the average estimated value of household consumption of all commodities grew by 7.8 percent.[98]

As shown in the graph below, the majority of smallholders have spent part of their increased incomes in household education and health, and most also invested part in improvements on the farm. Approximately one fifth of households put extra money into savings.

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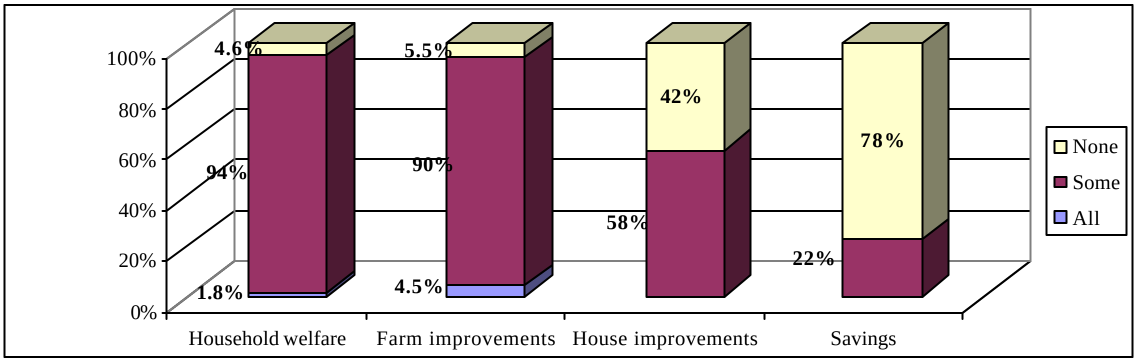
[95] A Schar, Awad Hussein, Ali Abd El Aal, "AgReform Final Evaluation," 15/03/2004, p. 16.
[96] See Appendix IV Tables 4.15 and 4.16.
[97] However, as noted in the next paragraph, the value of vegetables sold in the local market increased significantly.
[98] It is of note that the value of wheat, corn, and other field crop consumption decreased by 14 percent.

Figure 4.3: Household expenditures of *additional* income, 2004



The following sections explore smallholders' assessments of services by service area, and conclude with findings and farmers' recommendations.

SERVICES

TECHNICAL ASSISTANCE

AgLink and AgReform provided short term technical assistance to their clients through one-on-one consultations, seminars and farmers' meetings, farm visits, video presentations, link visits with the Ministry of Agriculture and Land Reclamation (MALR) researchers, and extension agent training.

As mentioned above, service provision has dipped this year with the closure of AgLink and AgReform and the time needed to get AERI activities off the ground, and in the CSR sample, 89 percent of farmers reported that they had received some form of technical assistance in the past year.[99] For AgLink farmers, whether or not they received technical assistance was highly correlated with how satisfied they were overall.[100] Of those who received TA, most did not pay. Of the 13 percent who did, the average cost was 5 LE for technical assistance.

SATISFACTION

Of those who received technical assistance, 99.7 percent stated that they were satisfied or very satisfied with the TA they had received, and 99 percent would recommend the services to other farmers. Farmers stated that they rated services highly due to the positive impact that these services had on their production and income over time.

<u>Veterinary, Nutrition, and Husbandry Technical Assistance</u>

AgLink introduced new technologies and management practices to dairy and beef farmers and processors in order to assist them to increase meat and dairy production and product quality. AgLink provided technical assistance through one-on-one consultations,

[99] As noted above, the CSR did not interview farmers in Lower Egypt where Partner field offices have closed.
[100] No statistically significant correlation existed for AgReform clients.

farmers' meetings, and video presentations at farm sites or AgLink field offices. AgLink also conducted periodic veterinary campaigns, in which qualified local veterinarians were brought into target communities to provide basic critical services at minimal cost to smallholders who otherwise would have had little or no access to such services. In order to ensure that assistance to smallholders would continue through the Ministry of Agriculture's (MALR) extension system, AgLink additionally trained 51 livestock extension agents on problem diagnosis; farm management and feasibility studies; updating technical information; and providing technical assistance to livestock.

Eighty-seven percent of AgLink farmers in Minya reported that they had received technical assistance in veterinary services, nutrition, and animal husbandry, and 71 percent had attended a veterinary campaign since the previous CSR. The majority of these smallholders received training from extension workers, expert visits, as well as group training sessions, and the vast majority--96 percent--implemented the recommendations.[101]

Clients again reported very high satisfaction ratings with these services this year. All farmers (100 percent) stated that they were satisfied or very satisfied, and 100 percent would also recommend services to other farmers.[102] Smallholders discussed how AgLink assistance had improved the health, fertility, and production of their animals, and how this had increased their income from local sales.

Veterinary assistance leads to a new business venture in Minya

In Samalout District in Minya, two smallholder clients paired with three livestock extension agents trained by AgLink to form a small profitable business trading damaged animals. The group bought animals with minor problems, often related to hoof or nutritional issues, at a reduced price (generally LE 100 to 200 below market price). Using the technical knowledge gained from AgLink training courses in animal nutrition, fattening, hoof trimming, and other topics, they were largely able to cure the animals within the week with proper treatment and feeding. The group then resold the animals at a higher price, drawing on the skills gained from AgLink's business training. By the close of AgLink, this new business enterprise had succeeded in buying and reselling 12 animals, generating a profit of approximately LE 2,220.

Technical Assistance in Cultivation Methods

AgReform provided technical assistance packages to farmers encompassing the entire cultivation process. This included assistance with procuring the correct agricultural inputs, introducing new varieties, assistance with cultivation and irrigation techniques, and introducing new technologies and equipment.

Ninety-five percent of AgReform's clients received assistance in improving their cultivation methods since the last CSR. The majority of smallholders received information through extension workers, group training sessions, and expert visits. It is noteworthy that AgReform's effort to involve AgReform-trained MALR extensionists in

[101] Extension workers: 100 percent, group training: 61 percent, expert visits: 46 percent. Farmers received information from more than one source; hence totals do not equal 100 percent.
[102] See Appendix IV Tables 4.4 and 4.5.

providing technical services to smallholders has had significant results over the past year. While only 29 percent of farmers reported that they had relied on extension workers' advice when learning new cultivation techniques in 2003, this year, three quarters of farmers referred to extensionists' participation in providing technical assistance.[103]

Of the 78 farmers who received TA in cultivation methods, 91 percent implemented all of the recommendations, and another six percent implemented some. Only two farmers (2.5 percent) did not implement any of the suggestions provided through AgReform's technical assistance. These farmers both stated that they did not have the resources to implement the recommendations.[104]

Growers assessed that assistance in cultivation techniques continued to have a significant impact on their productivity, income, and employment. Due to these positive results, 99 percent of growers stated that they were satisfied or very satisfied, and 97 percent would recommend AgReform cultivation methods assistance to other farmers.[105]

<u>Post-harvest Processing</u>

Farmers can increase the profitability of their produce by adopting improved post-harvest techniques. AgReform assists farmers adopt modern post-harvest processing methods through trained extension workers and group training sessions via farmer associations.

Sixty percent of AgReform clients surveyed received assistance in post-harvest processing this year. The majority were trained in group sessions, through extension workers, and from expert visits.[106] As with TA in cultivation methods, extensionists are playing a greater role in providing technical assistance. Sixty-seven percent of farmers cited extension workers' assistance in post-harvest processing, compared to only 18 percent last year. This is particularly noteworthy, given that extension workers had previously had little to no knowledge of this area prior to training provided by AgReform and other USAID Partners.[107]

Forty-eight out of 49 farmers implemented all of the recommendations provided, and the remaining farmer implemented some of the recommendations. This farmer stated that, while the advice was relevant, he did not have the resources to follow through with all of the suggested changes.

Growers rated these technical services highly this year as well. One hundred percent stated that they were satisfied or very satisfied, and 98 percent would recommend post-harvest assistance to other growers.[108]

[103] Extension worker: 74.7 percent, group training: 84 percent, expert visits: 79 percent. Farmers received information from more than one source; hence totals do not equal 100 percent.
[104] Both farmers had received recommendations related to drip irrigation methods.
[105] The one farmer who was dissatisfied stated that the technical assistance did not assist him because he did not grow green beans. See Appendix IV Tables 4.6 and 4.7.
[106] Group training: 88 percent; extensionsist: 67 percent; expert visit: 69 percent
[107] Other Partners who have been active in training extension workers in export-oriented production and processing include HEIA and APRP.
[108] See Appendix IV Tables 4.8 and 4.9.

Farmer-to-Farmer Training & Link Visits

AgLink and AgReform provided farmer-to-farmer training, in which targeted farmers received advanced training that they then disseminated throughout the community. Farmer to farmer training also took the form of study visits, in which Partners brought smallholders to model farms with demonstrated strengths in specific areas.

Seventy-seven farmers participated in farmer-to-farmer learning sessions in the past year, all of whom were AgReform clients. All of these farmers (100 percent) stated that they were satisfied or very satisfied, and 99 percent would recommend farmer-to-farmer training to others.[109] Twenty-one percent of farmers paid for link visits this year, which cost an average of LE 16.

Ninety-two percent of participants implemented all or some of the recommendations that they had learned, a slight decrease compared with last year (where 100 percent had followed the other farmers' suggestions). Of the nine farmers who did not implement some or any the recommendations given, four stated that the link visit did not cover the crops that they were growing, and three reported that they did not have the resources to make the changes. The remaining two farmers plan to begin cultivating the crop they saw on the visits (green beans), but the season had not yet started at the time of the interview.

Link visit leads to pilot cropping areas sold to exporters

In late 2003, a group of farmers from Qena traveled to Ismailia and Nobaria to visit farmers who cultivated green beans under tunnels. Following this visit, four Qena farmers studied the feasibility and profitability of growing green beans under tunnels at their own farms. They decided to plant a pilot area, and through the Danfeek farmer NGO, negotiated with two exporters to cultivate 11 feddans of land. In the written contract, the farmers agreed on a minimum floor price of LE 4500 per ton, and the exporters agreed to provide seeds and other inputs as an in-kind advance payment. The crop was harvested on schedule and delivered to the exporters.

MARKETING SERVICES

AgLink and AgReform provided marketing assistance to smallholders by linking them with traders and exporters and assisting them in the negotiation process. The overall goal of this service was to increase sales and income for participating smallholders. Sixty-two percent of AgReform clients (58 smallholders) reported that they had received marketing assistance in the past year (no AgLink clients received marketing TA during this period).

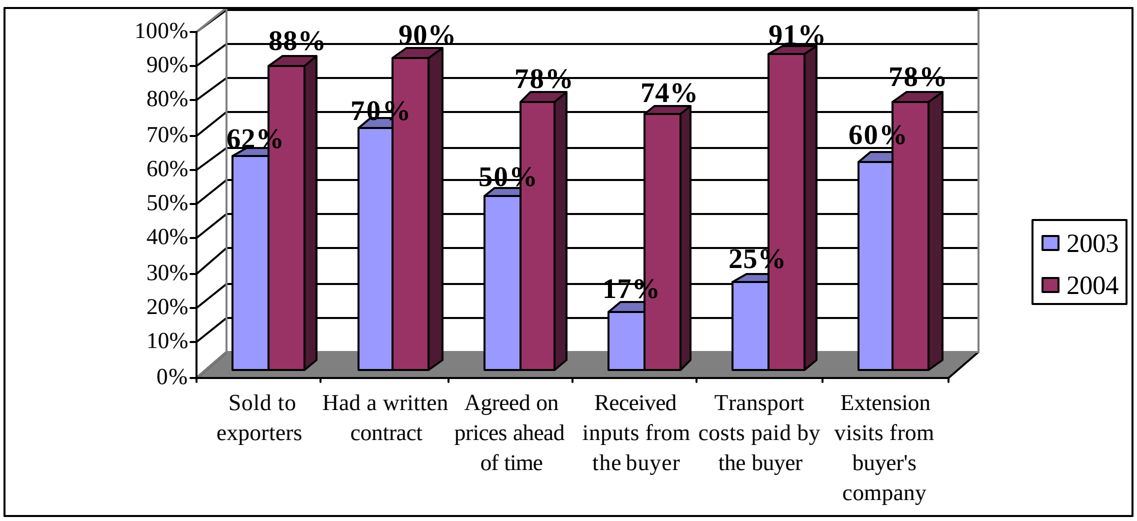
AgReform focused on providing growers with access to export markets through joint marketing efforts involving smallholders and farmer associations. Of the farmers who received assistance marketing their products this year, 95 percent reported that AgReform had helped them to link with exporters, 88 percent received assistance in negotiating contracts, and 90 percent received assistance drafting the actual contract. Only 19

[109] See Appendix IV Tables 4.10 and 4.11.

percent reported that they had received help in linking up with traders. The drop in deals with "middlemen" implies that these associations have been able to take on the role of coordinating and negotiating collective sales directly with exporters, rather than selling to traders (who would otherwise collect part of the profit for commission).

Indeed, 88 percent of farmers reported that their most recent sale had been to exporters, an increase of 26 percent over last year.[110] Ninety percent of farmers who received marketing assistance in selling their products had a written agreement with the buyer, a twenty percent increase compared with 2003.[111] As shown in the graph below, the terms of the agreement also improved significantly compared with last year's contracts. For example, while only one quarter of farmers had received compensation for transport costs last year, fully 91 percent had transport costs paid by the buyer this year. Additionally, while only 17 percent of farmers had received agricultural inputs from buyers last year, nearly three quarters (74 percent) of smallholders received inputs this year. These changes indicate that smallholders are selling more to exporters on a more formal basis, and that the terms of the agreement are improving over time.

Figure 4.4: Results of Marketing Assistance, 2003-2004



Furthermore, trust continues to grow between the parties, as smallholders, associations, and buyers are largely meeting the terms of agreement stipulated in the contracts. Two thirds of farmers reported that buyers had met all terms of their agreement, and another 28 percent reported that buyers had met some of the terms. Only 6.9 percent reported that buyers had met none of the agreed-upon terms. For those cases in which buyers did not abide by some of the terms of the agreement, the most frequent complaints on the part of the smallholders were that the buyers did not take the entire production of the farmer, and that the buyer did not pay the agreed-upon price.[112] The four farmers that reported that the buyer met none of the terms of the agreement stated that the exporter told them that their crop did not comply with international market standards.

[110] Sold to wholesalers: 5.2 percent; retailers: 1.7 percent; exporters: 88 percent; local cooperative: 3.4 percent. See Appendix IV Table 4.12.
[111] See Appendix IV Table 4.13.
[112] Did not take all production: 29 percent: did not pay the agreed-upon price: 29 percent.

Finally, 88 percent of farmers who received marketing assistance reported that they had hired more workers as a result of sales agreements. Smallholders hired an average of 27 new farm workers, all of whom were seasonal laborers.

SATISFACTION

Ninety-three percent of farmer clients were satisfied with Partner marketing assistance, which is a slight decline compared with last year (99 percent satisfaction in 2003).[113] The small number of farmers who were unsatisfied generally had negative experiences with exporters, and requested that Partners be even more involved in the sales process between the buyers and sellers to ensure that farmers' interests are protected.

CONCLUSION: RESPONDENTS' PERCEIVED NEEDS AND SUGGESTIONS

As this chapter has described, smallholder clients who have received services in the past year continue to rate them very highly, and farmers credited Partner services with increases in their income, production, sales, and employment. Farmers had a number of recommendations this year based on what services they need, and how to enhance those services that had been offered by Partners.

TECHNICAL ASSISTANCE

Farmers were very satisfied with the technical assistance provided, particularly services involving hands-on, participatory learning techniques. Technical assistance that introduced simple and low-cost technologies was particularly effective—farmers noted that it helped to convince them to consider alternative methods and techniques because they involved little risk and could be easily and inexpensively applied. Additionally, link visits and study tours were lauded by nearly all participants, as farmers were able to see for themselves how recommendations had been implemented by other farmers, both small and large. In addition to effective approaches to technical assistance, farmers had a number of suggestions involving the *types* of TA they would like to receive (or continue to receive).

FARMERS' SUGGESTION: PROVIDE ADDITIONAL ASSISTANCE IN AREAS RELATED TO CROP AND LIVESTOCK PRODUCTION

- <u>Livestock</u>

Smallholders' suggestions for technical assistance in the area of livestock production largely focused on the need for increased access to low-cost, high-quality animal healthcare. Farmers specifically requested more veterinary campaigns (which were rated very favorably) and/or the establishment of mobile veterinary units that would travel from village to village on a regular basis. Farmers emphasized that they were willing to pay for these services, as the

[113] See Appendix IV Table 4.14.

campaigns had made them aware of the importance of healthcare and the economic benefit of veterinary services.[114]

Smallholders also noted that they continued to need more technical information from livestock extension agents and farmer associations in the areas of animal nutrition, animal husbandry, and animal health.

- Crops

Growers requested additional technical assistance in modern and efficient production and post harvest practices. While growers' reliance on extension agents has increased significantly in the past year, the majority note that extensionists still require more training, and that they should receive new technical information useful to inform farmers on a regular basis. The most common suggestions for technical assistance included:

- Introducing farmers to *new crops and varieties*, particularly in order to take advantage of the summer planting season;[115]
- *Regular updates* on the most advanced cultivation methods, post-harvest practices, and proper packaging technologies;
- Additional information on acquiring small scale *processing technologies* including packing stations, cooling and refrigeration facilities, and drying units for herbs and flowers.[116]

MARKETING ASSISTANCE

Smallholders have continued to make significant progress this year in securing written contracts with exporters, resulting in higher prices for their products and increased income. In large part due to their experience working with Partners, farmers emphasized that improving their business and marketing skills were as crucial as improving their technical know-how. Farmers want more assistance in linking up with exporters, which includes assistance in setting up the initial contacts, in drafting an agreement with the buyers, and in ensuring that the terms of the sales agreement are met. Farmers also observed that they continued to need more market information in order to assist them when making cropping pattern decisions and when negotiating with buyers.

114 A number of farmers commented on the poor quality of the local government veterinarians. These veterinarians may require additional and on-going training to ensure that they can provide quality services to smallholders. In this respect, AgLink found that veterinary campaigns have been highly effective in providing on the job training, and can serve to re-establish credibility between the veterinarians and the smallholder clients.

115 AgReform did encourage farmers to utilize the agricultural summer season by helping them to identify crops with strong marketing potential that did not conflict with winter crop production dates. Recommendations for information on these summer crops (particularly aromatics) came largely from farmers who had seen others begin to cultivate during the summer season, and who wanted to do so as well. This is one strong indication that field visits and farmer-to-farmer learning programs had the desired effect of changing farmers' attitudes and convincing them to grow new (pilot) crops based on market demand.

116 Further discussed below, processing and infrastructure facilities may be one potential service that could be provided by farmers associations.

FARMERS' SUGGESTION: INCREASE ASSISTANCE IN MARKETING PRODUCTS

- Linking farmers with exporters

Through their associations, farmers are entering into an even greater number of deals with exporters, and the terms of the agreement have improved over time. Smallholders recommended that Partners continue and expand assistance to themselves and their associations when meeting with exporters and negotiating contracts. Clients also requested that they be introduced to a greater number of exporting companies in order to have a stronger negotiating position (in other words, reducing the monopsony power of the buyers).[117]

- Negotiation skills

Once farmers have been introduced to buyers, many want additional assistance in negotiating with the exporters. There were two primary suggestions for assistance involving the negotiation process. First, smallholders recommended that Partners play a stronger role in negotiating on behalf of the associations, and in ensuring that the contracts protect the interests of the sellers. Farmers in particular noted the value of Partners' assistance in developing written contracts with definite and detailed responsibilities, as conflict between sellers and buyers has decreased. Second, some requested training in negotiation skills, a recommendation which was not mentioned in previous years.

- Market information

Smallholders acknowledged that Partners had assisted them in analyzing market demand when making cropping pattern decisions. However, many once again requested more information, including the following:

- Current and projected demand and prices of different products in local and international markets;
- More information on the export "market windows" in order to plan the crop calendar;
- More assistance in calculating the costs of production when following GAP guidelines.

FARMER ASSOCIATIONS

In addition to recommendations for Partners, smallholders this year had a number of ideas on how their associations could best meet farmer needs. Farmers' comments largely focused on how associations could increase members' access to new export market opportunities, coordinate their purchase of input supplies, and enhance their collective marketing activities both locally and abroad. Many of the recommended

[117] A monopsony is a market in which there is a single buyer of a particular good or service. Those selling in a market characterized by monopsony are likely to suffer below-average profitability because of the lack of alternative outlets for their products.

services also offer revenue generating potential for the associations, as farmers indicated that they were willing to pay for many of the services listed below (particularly those related to input and equipment procurement).[118]

FARMERS' SUGGESTION: ASSOCIATIONS SHOULD EXPAND SERVICE PROVISION IN PRODUCTION AND MARKETING

- Equipment procurement

One of the biggest requests that farmers had for their associations was to invest in farm equipment. For example, farmers suggested that associations purchase a tractor or compost shredder that members could rent for specific periods of time.

- Bulk input purchases

Farmers also suggested that associations take a more active role in purchasing inputs in bulk for members in order to command a better price.

  - Farmers requested that associations acquire *seeds true to type* (as required by the exporters), and that Partners assist associations to identify reliable sources of seeds.
  - Farmers requested that associations purchase *fertilizer* in bulk. Farmers noted that, particularly at specific points in the year, fertilizer is difficult to acquire and the price is very high.
  - Farmers requested that associations assist them in purchasing high-quality *fodder* at more reasonable prices. Three problems in particular were noted: the price of feed (concentrate) is too high for small-scale producers to make a profit; the quality of the feed is low; and both the supply and the price of the ingredients are inconsistent.[119]

- Establishing central collection units

Farmers suggested that their associations establish central milk collection and preparation centers that provide access to milk cooling, filtering, and storage tanks where processors or large-scale traders could pick up the milk. Because the shelf-life of raw milk is very short, the lack of milk-collection centers allows traders and middlemen to determine the price they pay the producer, where the only controlling factor is competition among traders. Milk collection centers would put smallholders in a stronger negotiating position vis-à-vis traders.

[118] While these recommendations were from the farmers for their local associations, this does not imply that these associations have the current capacity to actually implement the following projects. What they in fact can, and cannot, do is a separate question beyond the scope of the CSR.

[119] Private mills produce good-quality feed, but it is expensive. According to an assessment conducted by APRP, the main government mill that provides concentrate to most Upper Egypt cities and villages produces a low-quality feed. Farmers and producers either mix the feed with ingredients from private mills to increase its quality, thus increasing the cost, or buy directly from the more expensive private mills to mix their own feed. This problem has led some small-scale farmers to pull out of the livestock industry because they cannot afford the high price of feed. ("Policy Issues in Beef and Dairy Production and Marketing in Egypt," August 2002).

- Processing facilities

Farmers requested that associations introduce small scale processing technologies to improve the value added to the products presently produced. Suggestions included investing in the following:

  - Drying facilities for herbs and aromatics;
  - Cooling facilities, including portable fast cooling units in the fields;
  - Sorting and packinghouses.[120]

- Community development

A number of farmers also emphasized the important role that associations should play in providing social services to benefit the entire community. These activities support the associations' credibility with their local communities, and can potentially generate revenue. Two types of services were most emphasized:

  - Projects for women, particularly income-generating activities. Such activities provided support to farmers' households and were looked upon as a means to reduce risk of growing for export.
  - Projects for youth, particularly in the area of education.

- Advocacy

Smallholders also mentioned some areas where they would like their associations to advocate on their behalf. Government policies that generated the most discussion included:

  - Access to credit. PBDAC is largely considered ineffective in providing loans to smallholders.
  - Access to water. A number of farmers noted that they needed more water allocated to their village by the Ministry of Water Resources and Irrigation.

120 While farmer associations do not have the technical and financial means to implement such projects independently, they do present possibilities for collaboration between the associations and the private sector.

CHAPTER FIVE: CONCLUSION

The 2004 CSR surveyed 340 businesses, associations, and smallholders in seven governorates who are clients of one or more Partners. These clients rated how satisfied they were with the services that they had received, and indicated how services could be improved.

SUMMARY OF FINDINGS

Businesses

Seventy-two percent of firms stated that they were satisfied with Partner services overall, and most would recommend services to others. Firms' recommendations fell into three primary categories: increase access to high-quality, tailored technical information; provide higher-quality market information and increase matchmaking assistance; and improve client-partner communications to make services more demand-driven. Because firms of varying sizes require different types of services, this year's CSR also noted particular needs of SMEs. Their concerns focused on ensuring equal access to services, receiving marketing services tailored to smaller firms, and reducing membership fees.

Associations

All business associations were satisfied with Partner services, and all would recommend them to other associations. These associations noted significant improvements in their capacity to deliver services to their members, increase member enrollment, and generate revenue. While the large majority of associations assess that they are capable of functioning without ALEB, these findings are based on subjective assessments from association management that may, or may not, fully reflect the reality of these associations' capacity. Associations' suggestions to enhance particular services include increasing chances for peer-based learning, expanding training topics, and enhancing service follow-up and Partner-association coordination.

Smallholders

Farmer satisfaction ratings have decreased over the past year, from 99 percent to 89 percent, largely due to the temporary cessation of service delivery due to the closure of AgReform and AgLink. Most farmers estimate significant improvements in their production and income, which has enabled them to increase expenditures in the areas of family health and education, farm improvements, and food consumption. Farmer suggestions focused on their continuing need to access technical assistance in the areas of livestock and crop production, and in marketing both locally and abroad. Smallholders also had a number of ideas of how their associations could increase members' access to new export market opportunities, coordinate their purchase of input supplies, and enhance their collective marketing activities.

IMPLICATIONS FOR USAID AND ITS PARTNERS

After eight years in operation, Growth Through Globalization (GTG) is nearing the end of a critical transition period. AgLink and AgReform have closed, and two new activities within the Agricultural Exports and Rural Income (AERI) have recently begun working with smallholders in nine governorates in Upper Egypt, following the "best practices" in service delivery developed under AgLink and AgReform. HEIA and ExpoLink, with the upcoming end of their grant period from USAID, now face the challenge of achieving sustainability, and are in the process of strategizing how to adjust services, costs, and funding sources in order to do so. ALEB will close operations in December 2004, and has been implementing its strategic plan for sustainability over the past year, consolidating gains and focusing on identifying "legacy" organizations to continue to offer many of the services developed under ALEB.

The importance of sustainability cannot be overemphasized. Businesses will continue to expect high-quality services from HEIA and ExpoLink, and will look to these and other associations to provide a number of the services that had begun under ALEB. ALEB has dedicated a significant amount of effort to developing local staff and consultant skills and to enhancing the technical and managerial ability of client associations to carry out these activities independent of ALEB in the future. To what extent this will happen now depends on the capacity and willingness of these associations to take on this extra role. While the associations themselves are optimistic about their capacity and future prospects, it remains to be seen how much of ALEB's legacy will be carried on through their association partners. ExpoLink, HEIA, and other trade associations will need to review their current services, costs, and funding sources, and should explore the opportunities available under the grant component of AERI. Sustainability, however, is more than just funding, and external assessments have indicated that a number of these associations continue to require additional technical assistance to develop and maintain in-demand services for their members.

For the smallholder activities, there is currently very little information concerning the farmers, particularly those in Lower Egypt, who are no longer receiving services. If Partners and USAID are to learn from these activities, USAID might consider implementing a follow-up analysis to understand what has, and has not happened, in these areas with the cessation of service delivery. Such a study would aim to develop a clear understanding of what the final impact was of eight years of assistance, including what long-term, sustainable improvements have been made for these farmers, and what, if anything, was not sustained and/or left unfinished.

While GTG is winding down, USAID is continuing its commitment to promoting private sector growth and competitiveness across the country through the AERI program. On the one hand, AERI represents a continuity of services that many Partners have provided in the past. It also represents new opportunities to explore innovative approaches to service delivery through assisted farmer and business associations. The Client Satisfaction Review intends to inform Partner and USAID management concerning what services have been particularly effective according to the clients themselves, in order to assist current, as well as new Partners, to develop and enhance particular services and to refine their overall approach to service delivery.

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APPENDICES

APPENDIX I: SAMPLING INFORMATION

Table 1.1: Sample Size for 200 Businesses by Governorate and by Partner

Governorate	ALEB	ExpoLink	HEIA	Total
Alexandria	10	12	6	28
Cairo/Giza	43	69	60	172
Total	53	81	66	200

Table 1.2: Sample Size for 10 Business Associations by Governorate and by Partner

Governorate	ALEB	Total
Alexandria	1	1
Cairo/Giza	9	9
Total	10	10

Table 1.3: Sample Size for 130 Smallholders by Governorate and by Partner

Governorate	AgLink	AgReform	Total
Fayoum	0	33	33
Minya	35	0	35
Qena	0	32	32
Sohag	0	30	30
Total	35	95	130

APPENDIX II: BUSINESS TABLES

Table 2.1: Distribution of Partners Business Sample by Sectors
(N= 200)

Source: RRSA; CSR Survey, August 2004

Partner	**ExpoLink**		**Aleb**		**HEIA**		**Total**	
	Count	Column %	Count	Column %	Count	Column %	Count	Column %
Manufacturing	68	84.0%	29	54.7%	2	3.0%	99	49.5%
Trade	7	8.6%	3	5.7%	2	3.0%	12	6.0%
Services			4	7.5%	2	3.0%	6	3.0%
Agribusiness	6	7.4%	17	32.1%	57	86.4%	80	40.0%
Other					3	4.5%	3	1.5%

Table 2.2: Distribution of Partners Business Sample by Size
(N= 193)

		ExpoLink		Aleb		HEIA		Total	
		Count	Column %	Count	Column %	Count	Column %	Count	Column %
Number of People Employed	<= 10	7	9.0%	4	7.7%	19	30.2%	30	15.5%
	11 TO 50	18	23.1%	18	34.6%	29	46.0%	65	33.7%
	51 TO 100	17	21.8%	8	15.4%	7	11.1%	32	16.6%
	> 100	36	46.2%	22	42.3%	8	12.7%	66	34.2%

Source: RRSA; CSR Survey, August 2004

Table 2.3: Satisfaction with Study Tours – Business Sample
(N= 45)

Category		ExpoLink		Aleb		HEIA		Total	
		Count	Column %	Count	Column %	Count	Column %	Count	Column %
Satisfied with Study Tour	Very Satisfied	3	100.0%	16	64.0%	13	76.5%	32	71.1%
	Satisfied			8	32.0%	3	17.6%	11	24.4%
	Neither								
	Dissatisfied					1	5.9%	1	2.2%
	Very Dissatisfied			1	4.0%			1	2.2%

Source: RRSA; CSR Survey, August 2004

Table 2.4: Recommend Study Tours for Other Firms – Business Sample
(N= 45)

		ExpoLink		Aleb		HEIA		Total	
		Count	Column %	Count	Column %	Count	Column %	Count	Column %
Recommend Study Tour	Yes	3	100.0%	25	100.0%	17	100.0%	45	100.0%
	No								

Source: RRSA; CSR Survey, August 2004

Table 2.5: Satisfaction with Management Training – Business Sample
(N= 32)

		Aleb		HEIA		Total	
		Count	Column %	Count	Column %	Count	Column %
Satisfied with Training	Very Satisfied	17	68.0%	6	85.7%	23	69.7%
	Satisfied	6	24.0%	1	14.3%	7	21.2%
	Neither	2	8.0%			2	6.1%
	Dissatisfied						
	Very Dissatisfied						

Source: RRSA; CSR Survey, August 2004

Table 2.6: Satisfaction with Marketing and Sales Training – Business Sample
(N= 27)

		Aleb		HEIA		Total	
		Count	Column %	Count	Column %	Count	Column %
Satisfied with Training	Very Satisfied	14	58.3%	3	100.0%	17	63%
	Satisfied	9	37.5%			9	33.3%
	Neither						
	Dissatisfied	1	4.2%			1	3.0%
	Very Dissatisfied						

Source: RRSA; CSR Survey, August 2004

Table 2.7: Satisfaction with Marketing Services (Information)- Business Sample
(N= 113)

		ExpoLink		Aleb		HEIA		Total	
		Count	Column %	Count	Column %	Count	Column %	Count	Column %
Satisfied with Marketing	Very Satisfied	18	29.5%	14	48.3%	7	30.4%	39	34.5%
	Satisfied	21	34.4%	10	34.5%	8	34.8%	39	34.5%
	Neither	7	11.5%	2	6.9%	5	21.7%	14	12.4%
	Dissatisfied	9	14.8%	2	6.9%	1	4.3%	12	10.6%
	Very Dissatisfied	6	9.8%	1	3.4%	2	8.7%	9	8.0%

Source: RRSA; CSR Survey, August 2004

Table 2.8: Clients Recommend Partners Marketing Information Services – Business Sample

		ExpoLink		Aleb		HEIA		Total	
		Count	Column %	Count	Column %	Count	Column %	Count	Column %
Recommend Marketing	Yes	46	75.4%	28	96.6%	19	82.6%	93	82.3%
	No	15	24.6%	1	3.4%	4	17.4%	20	17.7%

Source: RRSA; CSR Survey, August 2004

Table 2.9: Satisfaction with Corporate Image Building Service – Business Sample
(N=30)

		ExpoLink		Aleb		HEIA		Total	
		Count	Column %	Count	Column %	Count	Column %	Count	Column %
Satisfied with PM	Very Satisfied	14	77.8%	6	75.0%	3	75.0%	23	76.7%
	Satisfied	2	11.1%	2	25.0%	1	25.0%	5	16.7%
	Neither	2	11.1%					2	6.7%
	Dissatisfied								
	Very Dissatisfied								

Source: RRSA; CSR Survey, August 2004

Table 2.10: Recommend Corporate Image Building Service to other Firms – Business Sample
(N= 30)

		ExpoLink		Aleb		HEIA		Total	
		Count	Column %	Count	Column %	Count	Column %	Count	Column %
Recommend PM	Yes	18	100.0%	8	100.0%	4	100.0%	30	100.0%
	No								

Source: RRSA; CSR Survey, August 2004

Table 2.11: Trade Fair Attendance – Business Sample
(N= 79)

		ExpoLink		Aleb		HEIA		Total	
		Count	Column %	Count	Column %	Count	Column %	Count	Column %
Would Attend Another TF	Yes	37	100.0%	28	96.6%	13	100.0%	78	98.7%
	No			1	3.4%			1	1.3%

Source: RRSA; CSR Survey, August 2004

Table 2.12: Receive Training prior to Trade Fair – Business Sample
(N=79)

		ExpoLink		Aleb		HEIA		Total	
		Count	Column %	Count	Column %	Count	Column %	Count	Column %
Received Training for TF	Yes	30	81.1%	28	96.6%	6	46.2%	64	81.0%
	No	7	18.9%	1	3.4%	7	53.8%	15	19.0%

Source: RRSA; CSR Survey, August 2004

Table 2.13: Usefulness of the Trade Fair Training Received – Business Sample
(N= 64)

		ExpoLink		Aleb		HEIA		Total	
		Count	Column %	Count	Column %	Count	Column %	Count	Column %
Training Helpful	Very Helpful	27	90.0%	23	82.1%	3	50.0%	53	82.8%
	Somewhat Helpful	2	6.7%	3	10.7%	3	50.0%	8	12.5%
	Not Helpful	1	3.3%	2	7.1%			3	4.7%

Source: RRSA; CSR Survey, August 2004

Table 2.14: Desire to Receive Training prior to the Trade Fair- Business Sample
(N= 15)

		ExpoLink		Aleb		HEIA		Total	
		Count	Column %	Count	Column %	Count	Column %	Count	Column %
Wish to Have Training	Yes	4	57.1%			6	85.7%	10	66.7%
	No	3	42.9%	1	100.0%	1	14.3%	5	33.3%

Source: RRSA; CSR Survey, August 2004

APPENDIX III: ASSOCIATION TABLES

Table 3.1: Average Number of ALEB Association Members During 2004

	Mean	Median	Valid N
Total Members	496	358	10

Source: RRSA; CSR Survey, August 2004

TABLE 3.2: Age of ALEB Associations

	Mean	Median	Valid N
Years of Existence	10.80	7.00	10

Source: RRSA; CSR Survey, August 2004

Table 3.3: Number of Years of Received Services from ALEB

	Mean	Median	Valid N
Years of Services	1.90	1.50	10

Source: RRSA; CSR Survey, August 2004

Table 3.4: Satisfaction with ALEB Technical Assi stance in Service Development

		Count	Column %
Level of Satisfaction	Very Satisfied	4	57.1%
	Satisfied	3	42.9%
	Total	7	100.0%

Source: RRSA; CSR Survey, August 2004

Table 3.5: Recommend Technical Assistance in Service Development to Others

		Count	Column %
Recommend TA	Yes	7	100.0%
	Total	7	100.0%

Source: RRSA; CSR Survey, August 2004

Table 3.6: Received Technical Assistance in Policy Advocacy

		Count	Column %
TA in Policy Advocacy	No	10	100.0%
	Total	10	100.0%

Source: RRSA; CSR Survey, August 2004

Table3.7: Association Increased the Number of Services Offered in 2004

		Count	Column %
Increase Services	Yes	6	75.0%
	No	2	25.0%
	Total	8	100.0%

Source: RRSA; CSR Survey, August 2004

Table 3.8: Average Number of New Services Offered

	Mean	Median	Valid N
Number of New Services	8	5	6

Source: RRSA; CSR Survey, August 2004

Table 3.9: Reasons to Participate in ALEB's Program

		Count	Column %
Registration	No	10	100.0%
	Total	10	100.0%
Marketing	No	10	100.0%
	Total	10	100.0%
Organization	Yes	7	70.0%
	No	3	30.0%
	Total	10	100.0%
Fundraising	Yes	2	20.0%
	No	8	80.0%
	Total	10	100.0%
Advocacy	No	10	100.0%
	Total	10	100.0%
Training	Yes	4	40.0%
	No	6	60.0%
	Total	10	100.0%
Development	Yes	2	20.0%
	No	8	80.0%
	Total	10	100.0%
Membership	No	10	100.0%
	Total	10	100.0%

Source: RRSA; CSR Survey, August 2004

Table 3.10: Technical Assistance in Organizational Development and Strategic Planning

		Count	Column %
Received TA	Yes	9	90.0%
	No	1	10.0%
	Total	10	100.0%

Source: RRSA; CSR Survey, August 2004

Table 3.11: Would Recommend Technical Assistance in Organizational Development and Strategic Planning to Others

		Count	Column %
Recommend TA	Yes	9	100.0%
	Total	9	100.0%

Source: RRSA; CSR Survey, August 2004

Table 3.12: Level of Satisfaction of Technical Assistance

		Count	Column %
Level of Satisfaction	Very Satisfied	6	66.7%
	Satisfied	3	33.3%
	Total	9	100.0%

Source: RRSA; CSR Survey, August 2004

Table 3.13: Technical Assistance in Websi te Development

		Count	Column %
TA in Web Developm ent	Yes	5	50.0%
	No	5	50.0%
	Total	10	100.0%

Source: RRSA; CSR Survey, August 2004

Table 3.14: Level of Satisfaction with Website Development Assistance

		Count	Column %
Level of Satisfaction	Very Satisfied	1	20.0%
	Satisfied	2	40.0%
	Neither	1	20.0%
	Dissatisfied	1	20.0%
	Total	5	100.0%

Source: RRSA; CSR Survey, August 2004

APPENDIX IV: SMALLHOLDER TABLES

Table 4.1: Average Family Size by Partner – Smallholder Sample (N= 130)

	AgReform			AgLink			Total		
	Mean	Median	Valid N	Mean	Median	Valid N	Mean	Median	Valid N
Population Size	8	7	95	9	7	35	8	7	130

Source: RRSA; CSR Survey, August 2004

Table 4.2: Average Farm Size (Feddan) by Partner – Smallholder Sample (N= 127)

		AgReform		AgLink		Total	
		Count	Column %	Count	Column %	Count	Column %
Land Size	< 1 Feddan	11	11.7%	13	39.4%	24	18.9%
	1 - 3 Feddan	26	27.7%	13	39.4%	39	30.7%
	3 - 4 Feddan	17	18.1%	4	12.1%	21	16.5%
	>= 5 Feddan	40	42.6%	3	9.1%	43	33.9%
	Total	94	100.0%	33	100.0%	127	100.0%

Source: RRSA; CSR Survey, August 2004

Table 4.3: Numbers of Years of Collaboration with Partner – Smallholder Sample (N=130)

	AgReform			AgLink			Total		
	Mean	Median	Valid N	Mean	Median	Valid N	Mean	Median	Valid N
Years of Collaboration	4.20	3.00	95	2.23	2.00	35	3.67	3.00	130

Source: RRSA; CSR Survey, August 2004

Table 4.4: Level of Satisfaction with Veterinary Services (N=24)

		AgLink		Total	
		Count	Column %	Count	Column %
Satisfied with Service	Very Satisfied	17	70.8%	17	70.8%
	Satisfied	7	29.2%	7	29.2%
	Total	24	100.0%	24	100.0%

Source: RRSA; CSR Survey, August 2004

Table 4.5: Level of Satisfaction with Veterinary and Animal Husbandry Services (N= 32)

		AgLink		Total	
		Count	Column %	Count	Column %
Satisfied with Service	Very Satisfied	21	65.6%	21	65.6%
	Satisfied	11	34.4%	11	34.4%
	Total	32	100.0%	32	100.0%

Source: RRSA; CSR Survey, August 2004

Table 4.6: Recommend Cultivation Methods Assistance to Other Smallholders (N=79)

		AgReform		Total	
		Count	Column %	Count	Column %
Recommend Service	Yes	76	97.4%	76	97.4%
	No	2	2.6%	2	2.6%
	Total	78	100.0%	78	100.0%

Source: RRSA; CSR Survey, August 2004

Table 4.7: Level of Satisfaction with Cultivation Methods Assistance (N= 79)

		AgReform		Total	
		Count	Column %	Count	Column %
Satisfied with Service	Very Satisfied	71	91.0%	71	91.0%
	Satisfied	6	7.7%	6	7.7%
	Dissatisfied	1	1.3%	1	1.3%
	Total	78	100.0%	78	100.0%

Source: RRSA; CSR Survey, August 2004

Table 4.8: Recommend Post-Harvest Processing Assistance to Other Smallholders (N= 49)

		AgReform		Total	
		Count	Column %	Count	Column %
Recommend Service	Yes	48	98.0%	48	98.0%
	No	1	2.0%	1	2.0%
	Total	49	100.0%	49	100.0%

Source: RRSA; CSR Survey, August 2004

Table 4.9: Level of Satisfaction with Post-Harvest Processing Assistance (N=49)

		AgReform		Total	
		Count	Column %	Count	Column %
Satisfied with Service	Very Satisfied	48	98.0%	48	98.0%
	Satisfied	1	2.0%	1	2.0%
	Total	49	100.0%	49	100.0%

Source: RRSA; CSR Survey, August 2004

Table 4.10: Recommend Link Visits Services Other Smallholders (N=77)

		AgReform		Total	
		Count	Column %	Count	Column %
Recommend Service	Yes	76	98.7%	76	98.7%
	No	1	1.3%	1	1.3%
	Total	77	100.0%	77	100.0%

Source: RRSA; CSR Survey, August 2004

Table 4.11: Level of Satisfaction with Linked Visits

		AgReform		Total	
		Count	Column %	Count	Column %
Satisfied with Service	Very Satisfied	73	94.8%	73	94.8%
	Satisfied	4	5.2%	4	5.2%
	Total	77	100.0%	77	100.0%

Source: RRSA; CSR Survey, August 2004

Table 4.12: Type of Buyers for Most Recent Sale (N=58)

		AgReform		Total	
		Count	Column %	Count	Column %
Type of Buyers	Wholesalers	3	5.2%	3	5.2%
	Retailers	1	1.7%	1	1.7%
	Exporters	51	87.9%	51	87.9%
	Local Coop	2	3.4%	2	3.4%
	Others	1	1.7%	1	1.7%
	Total	58	100.0%	58	100.0%

Source: RRSA; CSR Survey, August 2004

Table 4.13: Type of Contract with Buyers of Farm Products (N=58)

		AgReform		Total	
		Count	Column %	Count	Column %
Type of Contract	Written	52	89.7%	52	89.7%
	Verbal	6	10.3%	6	10.3%
	Total	58	100.0%	58	100.0%

Source: RRSA; CSR Survey, August 2004

Table 4.14: Level of Satisfaction with Marketing Services (N=58)

		AgReform		Total	
		Count	Column %	Count	Column %
Satisfaction of Marketing	Very Satisfied	45	77.6%	45	77.6%
	Satisfied	9	15.5%	9	15.5%
	Neither	1	1.7%	1	1.7%
	Dissatisfied	1	1.7%	1	1.7%
	Very Dissatisfied	2	3.4%	2	3.4%
	Total	58	100.0%	58	100.0%

Source: RRSA; CSR Survey, August 2004

Table 4.15: Smallholder Average Farm Income by Group of commodities

Year 2003

	Value of Domestic Sales		Value of Exports		Value of Household Use		Gross Farm Income		Net Farm Income	
	Mean	Valid N	Mean	Valid N	Mean	Valid N	Mean	Valid N	Mean	Valid N
Field Crops	5161	102	778	2	948	103	6074	103	3853	103
Vegetables	16585	66	6462	36	78	89	14991	89	10324	89
Fruits	24086	13	56700	4	0	14	38566	14	22384	14
Aromatic, Medicinal	3758	10	.	0	52	10	3810	10	2370	10
Dairy	6175	17	.	0	1961	17	8136	17	6680	17
Meat	8450	25	.	0	84	25	8534	25	5315	23
Other Livestock	875	2	.	0	0	2	875	2	650	2
Total	9743	235	10976	42	541	260	11120	260	7325	258

Source: RRSA; CSR Survey, August 2004

Table 4.16: Smallholder Average Farm Income by Group of commodities

Year 2004

	Value of Domestic Sales		Value of Exports		Value of Household Use		Gross Farm Income		Net Farm Income	
	Mean	Valid N	Mean	Valid N	Mean	Valid N	Mean	Valid N	Mean	Valid N
Field Crops	7075	98	1680	1	816	98	7908	98	5235	98
Vegetables	21363	68	6048	49	166	103	16983	104	11037	104
Fruits	21098	12	84875	4	0	13	45590	13	21413	13
Aromatic, Medicinal	7071	6	3050	3	59	9	5790	9	4417	9
Dairy	9718	17	.	0	3099	17	12817	17	11258	17
Meat	8347	18	.	0	0	18	8347	18	5425	18
Other Livestock	.		.		.		.		.	
Total	12590	219	11345	57	583	258	13723	259	8757	259

Source: RRSA; CSR Survey, August 2004

APPENDIX V: SUMMARY OF SO-16 IR2 CLIENT SATISFACTION FOR SERVICES RECEIVED BY PARTNER

		Type of Client							
Partner	**Response**	**Business**		**Association**		**Smallholder**		**Total**	
Expolink	Very Satisfied	31	39.7%					31	39.7%
	Satisfied	20	25.6%					20	25.6%
	Neither	14	17.9%					14	17.9%
	Dissatisfied	7	9.0%					7	9.0%
	Very Dissatisfied	6	7.7%					6	7.7%
	Total	**78**	**100.0%**					**78**	**100.0%**
Aleb	Very Satisfied	31	60.8%	2	20.0%			33	54.1%
	Satisfied	10	19.6%	7	70.0%			17	27.9%
	Neither	4	7.8%	1	10.0%			5	8.2%
	Dissatisfied	4	7.8%					4	6.6%
	Very Dissatisfied	2	3.9%					2	3.3%
	Total	**51**	**100.0%**	**10**	**100.0%**			**61**	**100.0%**
HEIA	Very Satisfied	26	39.4%					26	39.4%
	Satisfied	23	34.8%					23	34.8%
	Neither	9	13.6%					9	13.6%
	Dissatisfied	5	7.6%					5	7.6%
	Very Dissatisfied	3	4.5%					3	4.5%
	Total	**66**	**100.0%**					**66**	**100.0%**
AgReform	Very Satisfied					67	70.5%	67	70.5%
	Satisfied					18	18.9%	18	18.9%
	Neither					9	9.5%	9	9.5%
	Very Dissatisfied					1	1.1%	1	1.1%
	Total					**95**	**100.0%**	**95**	**100.0%**
AgLink	Very Satisfied					18	51.4%	18	51.4%
	Satisfied					12	34.3%	12	34.3%
	Neither					3	8.6%	3	8.6%
	Dissatisfied					1	2.9%	1	2.9%
	Very Dissatisfied					1	2.9%	1	2.9%
	Total					**35**	**100.0%**	**35**	**100.0%**
Total	**Very Satisfied**	**88**	**45.1%**	**2**	**20.0%**	**85**	**65.4%**	**175**	**52.2%**
	Satisfied	**53**	**27.2%**	**7**	**70.0%**	**30**	**23.1%**	**90**	**26.9%**
	Neither	**27**	**13.8%**	**1**	**10.0%**	**12**	**9.2%**	**40**	**11.9%**
	Dissatisfied	**16**	**8.2%**			**1**	**.8%**	**17**	**5.1%**
	Very Dissatisfied	**11**	**5.6%**			**2**	**1.5%**	**13**	**3.9%**
	Total	**195**	**100.0%**	**10**	**100.0%**	**130**	**100.0%**	**335**	**100.0%**

Source: RRSA; CSR Survey, August 2004

APPENDIX VI: BUSINESS QUESTIONNAIRE

Name of business: ____________________________ Interview #: ______
Business ID: __________ Interviewer: _______
Name of respondent: ___________________________ Date: __________
Position of respondent: _________________________ Time: ___________
Governorate: _______________________
Partner: ____________________________

2004 RRSA CLIENT SATISFACTION REVIEW
BUSINESS QUESTIONNAIRE

I. BUSINESS PROFILE SECTION

1. In what year was this business registered? ENTER YEAR:_______________

2. In which sector do you work?
   (1) Manufacturing
   (2) Trade
   (3) Services
   (4) Agribusiness
   (5) Manufacturing – Trading
   (6) Agribusiness – Manufacturing
   (7) Agribusiness - Trading
   (8) Agribusiness – Manufacturing – Trading
   (9) Trading – Services
   (10) OTHER [SPECIFY]:_______________

3. How many people did you employ on July 1st, 2003?
ENTER NUMBER: _______________
REFUSED

4. How many people do you employ on July 1st, 2004?
ENTER NUMBER: _______________
REFUSED

5. What was the value of your domestic annual sales on July 1st, 2003? [IN EGYPTIAN POUNDS]
   (1) Less than 1million LE
   (2) 1 to10 million LE
   (3) 10 million to 20 million LE
   (4) More than 20 million
   (5) I don't sell domestically
   (6) No response

6. What is the value of your domestic annual sales on July 1st, 2004? [IN EGYPTIAN POUNDS]
   (1) Less than 1 million LE
   (2) 1 to 10 million LE
   (3) 10 to 20 million LE
   (4) More than 20 million LE
   (5) I don't sell domestically
   (6) No response

7. Between July 1st, 2003 and June 30th, 2004, did you sell to: [MARK ALL THAT APPLY]

   (1) A new client in a country the firm ALREADY exports to?
   NUMBER OF NEW CLIENTS____________

   (2) A new client in a country the firm DID NOT previously export to?
   NUMBER OF NEW CLIENTS____________

8. What was the value of your annual exports on July 1st, 2003? [IN EGYPTIAN POUNDS]
   (1) Less than 1 million LE
   (2) 1 to 10 million LE
   (3) 10 to 20 million LE
   (4) More than 20 million LE
   (5) I don't export
   (6) No response

9. What is the value of your annual exports on July 1st, 2004? [IN EGYPTIAN POUNDS]
   (1) Less than 1 Million LE
   (2) 1 to 10 million LE
   (3) 10 to 20 million LE
   (4) More than 20 million LE
   (5) I don't export
   (6) No response

10. In what year did you begin to participate in the programs of [PARTNER]?
ENTER YEAR: _____________

11. Why did you decide to participate in this program? [MARK ALL THAT APPLY]
   (a) To receive assistance in marketing products
   (b) To receive technical assistance in improving products
   (c) To receive technical assistance in improving processes
   (d) To receive management assistance
   (e) OTHER [SPECIFY]:____

12. Do you still participate in the programs of [PARTNER]?

(1) YES [GO TO Q 15]
(2) NO

13. What was the last year you participated in the programs? ENTER YEAR__________

14. What was the **main reason** you stopped participating in these programs?
    (1) No longer needed this assistance
    (2) Was not satisfied with the assistance received
    (3) Could not meet program requirements
    (4) Other: [PLEASE SPECIFY]: ______________________________________

III. ON-SITE CONSULTANT SECTION

15. Between July 1st, 2003 and June 30th, 2004, did your firm receive an on-site consultant visit by [PARTNER]?
    (1) Yes.
    (2) No. [GO TO NEXT SECTION, Q. 21]

16. COMPLETE FOR EACH VISIT RECEIVED THIS YEAR

A. What type of assistance did the consultant provide? (1)Product and Process Improvement (2)Management (3)Marketing (4)Sales (5)Other______	**B. Did your firm have a signed contract with the consultant ?** (1)Yes (2) No	**C. Did your firm pay for all, some or none of the cost the consultant visit?** (1)ALL [GO TO C1] (2) SOME [GO TO C1] (3) NONE [GO TO D] C1. What was the cost?	**D. Was the consultant:** (1)Egyptian (2)International	**E. How was the consultant selected?** (1)Referral from another firm (2)He/she had helped firm before (3)Partner identified him/her in response to my request (4)Partner identified him/her to meet many firms, I signed up (5) Other ____________	**F. How much time did the consultant spend with your firm?** (1)<2 hours (2)Half a day (3)One day (4)2 to 3 days (5)>3 days	**G. Did you implement all, some or none of the consultant's recommend-actions?** (1)ALL [GO TO H] (2) SOME [GO TO H and I] (3) NONE [GO TO J]	**H. <u>Which</u> recommendations did you implement?** **I. Which recommendations did you NOT implement?**	**J. What was the main reason you did not implement any of the recommendations?** (1)Recommendations not appropriate (2)Needed follow-up help to implement the recommendations (3)Plan to implement in future, but waiting for market conditions to improve (4) Could not access financing (5) Other [SPECIFY]
1 Product and process improvement **1. Yes** **2. No**							<u>IMPLEMENTED</u>: <u>DID NOT</u> IMPLEMENT:	
2 Management **1. Yes** **2. No**							<u>IMPLEMENTED</u>: <u>DID NOT</u> IMPLEMENT:	
3 Marketing **1. Yes** **2. No**							<u>IMPLEMENTED</u>: <u>DID NOT</u> IMPLEMENT:	
4 Sales **1. Yes** **2. No**							<u>IMPLEMENTED</u>: <u>DID NOT</u> IMPLEMENT:	

17. Would you recommend an on-site consultant visit to other firms?
    (1) Yes.
    (2) No.
    (3) Maybe, under certain circumstances.

18. How satisfied or dissatisfied are you with the consultant visits that you have had this year?
    (1) very satisfied
    (2) satisfied
    (3) neither
    (4) dissatisfied
    (5) very dissatisfied

19. What are the main reasons you are [satisfied/not satisfied] with the consultants visits?

IV. TRAINING SECTION

20. Between July 1st, 2003 and June 30th, 2004, did your firm participate in any training courses offered by [PARTNER]?
    (1) Yes.
    (2) No. [GO TO NEXT SECTION, Q. 23]

Now I have a few questions on the training services offered by [Partner]. COMPLETE FOR ALL THAT APPLY

Between July 1st, 2003 and June 30th, 2004, **did your firm receive** **(1) YES** **(2) NO**	**A. Was this training provided by** (1) International consultant (2) Local consultant (3) Project Staff	**B. How many employees participated?** ENTER NUMBER	**C. Did you implement all, some or none of the lessons or ideas that you received from this the training?** (1) ALL [GO TO C1.] (2) SOME [GO TO C1] (3) NONE [GO TO D] **C1. WHAT IDEAS, AND HOW?**	**D. How satisfied or dissatisfied were you with this training?** (1) very satisfied (2) satisfied (3) neither (4) dissatisfied (5) very dissatisfied	**E. What were the most useful aspects of the training?**	**F. What were the least useful aspects of the training?**	**G. Would you recommend this training to other businesses?** (1) Yes (2) No
1 **Product and Process Improvement** **YES/NO**	(1)Intl consultant (2)Local consultant (3) Project Staff						
2 **Management** **YES/NO**	(1)Intl consultant (2)Local consultant (3) Project Staff						
3 **Marketing & Sales** **YES/NO**	(1)Intl consultant (2)Local consultant (3) Project Staff						
4 **Other** **YES/NO**	(1)Intl consultant (2)Local consultant (3) Project Staff						

MARKETING SECTION

21. Between July 1st, 2003 and June 30th, 2004, did your company receive any of the following marketing services?
(1) Yes [COMPLETE FOR ALL THAT APPLY]
(2) No [GO TO Q 23]

Did your firm receive ___________? **(1) YES** **(2) NO**	**A. How much did you pay for this service?** ______LE.	**B. How satisfied or dissatisfied were you with the __________?** (1) very satisfied (2) satisfied (3) Neither (4) dissatisfied (5) very dissatisfied	**C. What were the most helpful aspects of the _____________?**	**D. What were the least useful aspects of the ______________?**	**E. Would you recommend this service to other businesses?** (1) Yes (2) No
a) **Market information**	______LE _________%				1- Yes 2- No
b) **Brochures & promotional materials**	______LE _________%				1- Yes 2- No
c) **Matchmaking**	______LE _________%				1- Yes 2- No
d) **Inward buying missions**	______LE _________%				1- Yes 2- No
e) Study Tours	______LE __________%				1- Yes 2- No

TRADE FAIR SECTION

22. Between July 1st, 2003 and June 30th, 2004, did you attend any trade fairs sponsored by [PARTNER]?
(1) YES
(2) NO [GO TO NEXT SECTION, Q 35]

23. Did you pay for all, some, or none of the cost of attending this trade fair provided by [PARTNER]?
(1) ALL ___________ LE
(2) SOME __________% ___________LE
(3) NONE

24. Did you receive any training to prepare for the trade fair?
(1) YES
(2) NO [GO TO Q 28]

25. Was this training helpful in preparing for the trade fair? Would you say very helpful, somewhat helpful, or not at all helpful?
(1) VERY HELPFUL
(2) SOMEWHAT HELPFUL
(3) NOT AT ALL HELPFUL

26. What was most helpful?
____
____

27. What was least helpful?
____
____
[GO TO Q 30]

28. Would you have liked to have had training to help you to prepare for the trade fair?
(1) YES
(2) NO

29. What type of training would you have liked to have received? [MARK ALL THAT APPLY]
(1) Orientation
(2) Training in how to make a sale
(3) Negotiation skills
(4) Other [SPECIFY] ___________________________________

30. Did you make any sales during this trade fair?
(1) YES
(2) NO

31. How many contacts did you make that you followed up by telephone calls, emails, or business deals?
__________[ENTER NUMBER]

32. Would you attend another trade fair sponsored by [PARTNER]?
    (1) YES
    (2) NO

33. What is the main reason that you [would/would not] attend another trade fair?
    ____
    ____
    ____
    ____

34. Overall, how satisfied or dissatisfied were you with the trade fair?
    (1) very satisfied
    (2) satisfied
    (3) neither
    (4) dissatisfied
    (5) very dissatisfied

VI. ADVOCACY & POLICY SECTION

Now we are moving to some questions about your opinion of [partner's] role in advocating for pro-business policies.

35. In your opinion, has [PARTNER] been very effective, somewhat effective or not at all effective in persuading the government to help the business community?
    (1) VERY EFFECTIVE
    (2) SOMEWHAT EFFECTIVE
    (3) NOT AT ALL EFFECTIVE
    (4) DON'T KNOW [GO TO Q 38]

36. How effective or ineffective have they been in __________? Would you say very effective, somewhat effective or not at all effective?
    (a) Customs
        (1) VERY EFFECTIVE
        (2) SOMEWHAT EFFECTIVE
        (3) NOT AT ALL EFFECTIVE
    (b) Licensing
        (1) VERY EFFECTIVE
        (2) SOMEWHAT EFFECTIVE
        (3) NOT AT ALL EFFECTIVE

    (c) Labor regulations
        (1) VERY EFFECTIVE
        (2) SOMEWHAT EFFECTIVE
        (3) NOT AT ALL EFFECTIVE
    (d) Tax regulations
        (1)VERY EFFECTIVE
        (2) SOMEWHAT EFFECTIVE
        (3) NOT AT ALL EFFECTIVE
    (e) OTHER [SPECIFY]: ____
        (1)VERY EFFECTIVE
        (2) SOMEWHAT EFFECTIVE
        (3) NOT AT ALL EFFECTIVE

37. Would you like to see [PARTNER] engage in more advocacy efforts in the following areas? [MARK ALL THAT APPLY]
    (1) Customs
    (2) Licensing
    (3) Labor regulations
    (4) Tax regulations
    (5) OTHER [SPECIFY]: ____

38. As an exporter/importer, what are the specific customs areas that are particularly difficult for your business? [MARK ALL THAT APPLY]
    (1) I don't import nor export
    (2) appeal/arbitration mechanisms
    (3) how brokers are licensed
    (4) customs clearance procedures
    (5) GOEIC inspections
    (6) I don't face any difficulties with Customs
    (7) OTHER [SPECIFY]:__________________________

39. Does your firm import from abroad?
    (1) Yes
    (2) No [GO TO Q. 41]

40. When you import, how much of a delay do the following procedures cause your firm?

40. When you import, how muc a delay do the following procedures cause your firm Importing procedures	A <u>very</u> significant source of delay	A <u>somewhat</u> significant source of delay	A <u>minor</u> source of delay	<u>Not</u> a source of delay	I do not know
The amount of paperwork require before shipping to Egypt					
The firms' poor understanding of required paperwork and procedures					
Port congestion and operations					
GOEIC inspections related to health and/or agriculture					

Now I have some questions on the new perishables terminal at the Cairo Airport.

41. Do you export fresh horticultural produce?
    (1) Yes
    (2) NO [GO TO NEXT SECTION, Q.49]

42. 44. Have you used the new perishables terminal at the Cairo Airport?
    (1) Yes [GO TO Q. 44]
    (2) No

43. 45. Why did you not use it?

____
____
____
____

[GO TO FINAL SECTION, Q 49]

44. Why do you use the perishables terminal?
    (1) I am happy with the quality of the service
    (2) It is required by Ministerial Decree
    (3) Other [SPECIFY] ______________________

45. How satisfied or dissatisfied are you with the perishables terminal?
    (1) very satisfied
    (2) satisfied
    (3) neither
    (4) dissatisfied
    (5) very dissatisfied

46. What is the main reason you are [satisfied/dissatisfied] with the perishables terminal?
____
____
____
____
____

47. Do you have any recommendations for improving the perishables terminal?
    (1) Yes
    (2) No [GO TO Q. 49]

48. What are these recommendations?
____
____
____

VIII. ASSESSING PARTNERS' SERVICES OVERALL

49. Overall, how satisfied or dissatisfied are you with [PARTNER] services?
    (1) very satisfied
    (2) satisfied
    (3) neither
    (4) dissatisfied
    (5) very dissatisfied

50. Do you have any suggestions for improving [PARTNER] services?
    (1) YES
    (2) NO [GO TO Q 52]

51. What are these suggestions?
____
____
____
____
____

52. Are there any other services that you would want [PARTNER] to offer?
(1) YES
(2) NO [END OF INTERVIEW]

53. What are these services?
____
____
____
____
____

[END OF INTERVIEW]

Thank you for your time and cooperation.

APPENDIX VII: ASSOCIATION QUESTIONNAIRE

Name of association: _________________________ Interview #: ______
Association Registration Number: __________ Interviewer: _______
Name of respondent: _________________________ Date: __________
Position of respondent: ______________________ Time: ___________
Governorate: _______________________________
Partner: ___________________________________

2004 RRSA CLIENT SATISFACTION REVIEW
TRADE ASSOCIATION QUESTIONNAIRE

I. ASSOCIATION PROFILE SECTION

1. When was this association founded? [YEAR]__________

2. What are the main objectives of your association?
____
____
____
____

3. How many members did you have as of July 31st 2003? [ENTER NUMBER]____________

4. How many members do you have as of July 31st 2004? [ENTER NUMBER]____________

5. What percentage of your members can vote in the general assembly meetings?
   (1) less than 25%
   (2) between 26-50%
   (3) between 51-75%
   (4) over 75%
   (5) All

6. What were your annual revenues between July 1st 2002 and June 30th 2003? [ENTER NUMBER]____________

7. How much of these revenues were from:
   (1) Service fees. AMOUNT __________________________LE
   (2) Membership dues. AMOUNT ____________________LE
   (3) Donations from Egyptian private sector. AMOUNT _________________LE
   (4) OTHER. _____________________ AMOUNT _________________LE

8. What were your annual revenues between July 1st 2003 and June 30th 2004? [ENTER NUMBER]____________

9. How much of these revenues were from:
   (1) Service fees. AMOUNT __________________________LE
   (2) Membership dues. AMOUNT ____________________LE
   (3) Donations from Egyptian private sector. AMOUNT _________________LE
   (4) OTHER. _____________________ AMOUNT _________________LE

10. Between July 1st 2003 and June 30th 2004, have you increased the number of different services you offer to members?
   (1) Yes

(2) No [GO TO Q. 12]

11. How many new services did you offer? [ENTER NUMBER] ____________

12. Do you advocate to the government on policy issues of importance to your members?
    (1) Yes
    (2) No [GO TO Q. 13]

13. What are the primary issues that you focus on? [MARK ALL THAT APPLY]
    (1) Customs
    (2) Licensing
    (3) Labor regulations
    (4) Tax regulations
    (5) OTHER [SPECIFY]: ____

14. OTHER THAN BOARD MEMBERS, how many of your staff work on a voluntary basis?
    [ENTER NUMBER] ________________________

15. In what year did you begin to receive services from ALEB?
    [ENTER YEAR]: _________________

16. Why did you decide to participate in this program? [MARK ALL THAT APPLY]
    (f) To receive assistance registering the association
    (g) To receive assistance in marketing members' products
    (h) To receive technical assistance in organizing the association (developing mission statements, strategic action plans, rules of governance, etc).
    (i) To receive fundraising assistance
    (j) To receive assistance in learning how to advocate on behalf of the members
    (k) To attend training
    (l) To receive assistance in developing services for members
    (m) To receive assistance in increasing membership
    (n) OTHER [SPECIFY]:____

17. Do you still receive services from ALEB?
    (1) YES [GO TO NEXT SECTION, Q. 20]
    (2) NO

18. In what year did you stop receiving services from ALEB?
    ENTER YEAR: _________________

19. What was the main reason you stopped receiving assistance?
    (1) No longer needed this assistance
    (2) Was not satisfied with the assistance received
    (3) Could not meet program requirements
    (4)Other: [PLEASE SPECIFY]: _______________________________________

III. TECHNICAL ASSISTANCE SECTION

Now I have some questions on the technical assistance you received from ALEB.

20. **Between July 1st 2003 and June 30th 2004, did you receive any technical assistance from ALEB**? COMPLETE FOR ALL THAT APPLY.
(1)Yes
(1) No [GO TO Q. 21]

A. Did you receive help with _____? (1) **Yes** (2) **No**	**B. Was this:** (1) Group training with other associations OR (2) One-on-one consultation	**C. Did you implement all, some, or none of the ideas or activities following the technical assistance?** (1)ALL [GO TO C1] (2)SOME [GO TO C1] (3) NONE [GO TO D] C1: What did you implement?	**Would you Recommend this _____ to other associations** (3) Yes (4) No	**How satisfied or dissatisfied are you with ______?** (1) very satisfied (2)satisfied (3)neither (4)dissatisfied (5)very dissatisfied	**What were the most useful aspects of the technical assistance?**	**What were the least useful aspects of the technical assistance?**
1) Organizing conferences, seminars, or other public awareness events	(1) Group (2) One-on-one		(1) Yes (2) No			
2) Assistance in developing services for members	(1) Group (2) One-on-one		(1) Yes (2) No			
3) Fundraising	(1) Group (2) One-on-one		(1) Yes (2) No			
4) Strategic planning, developing action plans, missions statements	(1) Group (2) One-on-one		(1) Yes (2) No			
5) Policy advocacy	(1) Group (2) One-on-one		(1) Yes (2) No			
6) Marketing, strategic alliance assistance	(1) Group (2) One-on-one		(1) Yes (2) No			
7) Website development	(1) Group (2) One-on-one		(1) Yes (2) No			

IV. ASSOCIATION SERVICES TO MEMBERS

21. **Does your association provide any of the following services to your members**? [MARK ALL THAT APPLY].

(1) YES

(2) NO [GO TO Q. 22]

A. Does your association offer ________ to members? (1) Yes (2) No	**B. Is this service offered with ALEB's assistance? (1)Yes [GO TO C] (2)No [GO TO H]**	**C. Can the association provide the service without <u>technical</u> assistance in the future?**	**D. Can the association provide the service without <u>financial</u> assistance in the future?**	**E. How long has this service been offered (1)< 6 months (2) 7 to 12 months (3) > one year (4) > 2 years**	**F. Between July 1 and June 30 '04, what is the number of members who received this service**	**G. Did you charge a fee for this service? (1) Yes (2) No**	**H. In the next three years, do you plan to offer this servi ce?**	**I. Will you need <u>technical</u> assistance to offer this service?**	**J. Will you need <u>financial</u> assistance to offer this service?**
1) Providing technical consultants (1) Yes 2) No	(1) Yes (2) No	(1) Yes (2) Uncertain (3) No	(1) Yes (2) Uncertain (3) No	(1)< 6 months (2) 7 to 12 months (3) > one year (4) > 2 years	________	(1) Yes (2) No	(1) Yes (2) No	(1) Yes (2) No	(1) Yes (2) No
) Training or vorkshops (1) Yes (2) No	(1) Yes (2) No	(1) Yes (2) Uncertain (3) No	(1) Yes (2) Uncertain (3) No	(1)< 6 months (2) 7 to 12 months (3) > one year (4) > 2 years	______	(1) Yes (2) No	(1) Yes (2) No	(1) Yes (2) No	(1) Yes (2) No
) Assist in ertifying member irms (HAACP, GAP, etc) (1) Yes (2) No	(1) Yes (2) No	(1) Yes (2) Uncertain (3) No	(1) Yes (2) Uncertain (3) No	(1)< 6 months (2) 7 to 12 months (3) > one year (4) > 2 years	______	(1) Yes (2) No	(1) Yes (2) No	(1) Yes (2) No	(1) Yes (2) No
) Sponsor study ours (in Egypt or nternational) (1) Yes (2) No	(1) Yes (2) No	(1) Yes (2) Uncertain (3) No	(1) Yes (2) Uncertain (3) No	(1)< 6 months (2) 7 to 12 months (3) > one year (4) > 2 years	______	(1) Yes (2) No	(1) Yes (2) No	(1) Yes (2) No	(1) Yes (2) No
) Provide market nformation (1) Yes 2) No	(1) Yes (2) No	(1) Yes (2) Uncertain (3) No	(1) Yes (2) Uncertain (3) No	(1)< 6 months (2) 7 to 12 months (3) > one year (4) > 2 years	______	(1) Yes (2) No	(1) Yes (2) No	(1) Yes (2) No	(1) Yes (2) No
)Assist members in narketing and/or leveloping business ontacts (suppliers nd sales) 1) Yes 2) No	(1) Yes (2) No	(1) Yes (2) Uncertain (3) No	(1) Yes (2) Uncertain (3) No	(1)< 6 months (2) 7 to 12 months (3) > one year (4) > 2 years	________	(1) Yes (2) No	(1) Yes (2) No	(1) Yes (2) No	(1) Yes (2) No
) Organize onferences, eminars, or other ublic events (1) Yes (2) No	(1) Yes (2) No	(1) Yes (2) Uncertain (3) No	(1) Yes (2) Uncertain (3) No	(1)< 6 months (2) 7 to 12 months (3) > one year (4) > 2 years	________	(1) Yes (2) No	(1) Yes (2) No	(1) Yes (2) No	(1) Yes (2) No
)THER [SPECIFY]	(1) Yes (2) No	(1) Yes (2) Uncertain (3) No	(1) Yes (2) Uncertain (3) No	(1)< 6 months (2) 7 to 12 months (3) > one year (4) > 2 years	________	(1) Yes (2) No	(1) Yes (2) No	(1) Yes (2) No	(1) Yes (2) No

22. Overall, how satisfied or dissatisfied are you with ALEB's services?
    (1) very satisfied
    (2) satisfied
    (3) neither satisfied nor dissatisfied
    (4) dissatisfied
    (5) very dissatisfied

23. What are the most useful aspects of ALEB's services?

____
____
____
____
____
____

24. What are the least useful aspects?

____
____
____
____
____

25. Would you recommend ALEB's services to other associations?
    (1) YES
    (2) NO

26. What is the main reason that you would, or would not, recommend ALEB?

____
____
____
____

27. How would you suggest that ALEB improve its services?
    (3) ____
    (4) ____
    (5) ____
    (6) None

28. Are there any other services that you need that are not currently offered by ALEB?
    (3) YES
    (4) NO [GO TO Q. 30]

29. What are these services?

____
____
____
____

30. After December 2004, can the association function without ALEB assistance?
    (1) YES
    (2) NO

31. After December 2004, can the association function without any donor support?
    (1) YES [GO TO Q. 34]
    (2) NO

32. Does the association need technical assistance from other donors?
    (1) YES
    (2) NO

33. Does the association need financial assistance from other donors?
    (1) YES
    (2) NO

34. In 2005, do you expect the association to increase, maintain, or decrease its current level of activity?
    (1) INCREASE
    (3) MAINTAIN
    (2) DECREASE

35. Between July 1st 2003 and June 30th 2004, did your association receive assistance from any other organization?
(1) YES
(2) NO [END INTERVIEW]

36. Please tell me the name of the organization and type of assistance they provide you.

NAME OF ORGANIZATION	TYPE OF ASSISTANCE

[END INTERVIEW]

Thank you for your time and cooperation.

APPENDIX VIII: SMALLHOLDER QUESTIONNAIRE

Name of Farmer: ___________________________
Farm ID: __________
Governorate: ______________________________
Village: __________________________________
Partner: __________________________________

Interview #: ______
Interviewer: _________________
Date: ____________
Time: ____________

RRSA CLIENT SATISFACTION REVIEW
SMALLHOLDER QUESTIONNAIRE

I. SMALLHOLDER PROFILE SECTION

1. Including yourself, how many people live in this household?
   [ENTER NUMBER]: _________

2. How large is your farm?
   (1) Less than one feddan
   (2) One to two feddans
   (3) Three to four feddans
   (4) Five or more feddans

3. How many head of livestock did you own as of July 1st 2003?
   (1) Buffalo__________________
   (2) Cows __________________
   (3) Sheep __________________
   (4) Other [SPECIFY] ___________________

4. How many head of livestock did you own as of July 1st 2004?
   (1) Buffalo__________________
   (2) Cows __________________
   (3) Sheep __________________
   (4) Other [SPECIFY] ___________________

5. Between July 1st 2002 and June 30th 2003, how many people did you employ?
   [ENTER NUMBERS]
   (1) Full-time ___________________
   (2) Part-time ___________________
   (3) Seasonal ___________________

6. Between July 1st 2003 and June 30th 2004, how many people have you employed?
   [ENTER NUMBERS]
   (1) Full-time ___________________
   (2) Part-time ___________________
   (3) Seasonal only ___________________

7. In what year did you begin to work with [PARTNER]?
   [ENTER YEAR]:_________

8. The next questions are about your production and sales

A-YEAR 2002-2003

) CROP/ IVESTOCK RODUCT	A. How much did you produce between July 1st, 2002 and June 30th, 2003?	B. Did you sell any of your product locally? (1)YES (2)NO	C. Between July 1st, 2002 and June 30th, 2003, how much was the price per unit?	D. What was the quantity you sold locally?	E. Did you export any of your produce? (1)YES (2) NO	F. Between July 1st, 2002 and June 30th, 2003, how much was the export price per unit?	G. What was the quantity you exported?	H. Between July 1st, 2002 and June 30th, 2003, what was your total cost of production?
) CROP/ IVESTOCK RODUCT	A. How much did you produce between July 1st, 2002 and June 30th, 2003?	B. Did you sell any of your product locally? (1)YES (2)NO	C. Between July 1st, 2002 and June 30th, 2003, how much was the price per unit?	D. What was the quantity you sold locally?	E. Did you export any of your produce? (1)YES (2) NO	F. Between July 1st, 2002 and June 30th, 2003, how much was the export price per unit?	G. What was the quantity you exported?	H. Between July 1st, 2002 and June 30th, 2003, what was your total cost of production?
) CROP/ IVESTOCK RODUCT	A. How much did you produce between July 1st, 2002 and June 30th, 2003?	B. Did you sell any of your products locally? (1)YES (2)NO	C. Between July 1st, 2002 and June 30th, 2003, how much was the price per unit?	D. What was the quantity you sold locally?	E. Did you export any of your produce? (1)YES (2) NO	F. Between July 1st, 2002 and June 30th, 2003, how much was the export price per unit?	G. What was the quantity you exported?	H. Between July 1st, 2002 and June 30th, 2003, what was your total cost of production?
) CROP/ IVESTOCK RODUCT	A. How much did you produce between July 1st, 2002 and June 30th, 2003?	B. Did you sell any of your products locally? (1)YES (2)NO	C. Between July 1st, 2002 and June 30th, 2003, how much was the price per unit?	D. What was the quantity you sold locally?	E. Did you export any of your produce? (1)YES (2) NO	F. Between July 1st, 2002 and June 30th, 2003, how much was the export price per unit?	G. What was the quantity you exported?	H. Between July 1st, 2002 and June 30th, 2003, what was your total cost of production?
) CROP/ IVESTOCK RODUCT	A. How much did you produce between July 1st, 2002 and June 30th, 2003?	B. Did you sell any of your products locally? (1)YES (2)NO	C. Between July 1st, 2002 and June 30th, 2003, how much was the price per unit?	D. What was the quantity you sold locally?	E. Did you export any of your produce? (1)YES (2) NO	F. Between July 1st, 2002 and June 30th, 2003, how much was the export price per unit?	G. What was the quantity you exported?	H. Between July 1st, 2002 and June 30th, 2003, what was your total cost of production?
) CROP/ IVESTOCK RODUCT	A. How much did you produce between July 1st, 2002 and June 30th, 2003?	B. Did you sell any of your products locally? (1)YES (2)NO	C. Between July 1st, 2002 and June 30th, 2003, how much was the price per unit?	D. What was the quantity you sold locally?	E. Did you export any of your produce? (1)YES (2) NO	F. Between July 1st, 2002 and June 30th, 2003, how much was the export price per unit?	G. What was the quantity you exported?	H. Between July 1st, 2002 and June 30th, 2003, what was your total cost of production?

B- YEAR 2003-2004

) CROP/ .IVESTOCK 'RODUCT	A. How much did you produce between July 1st, 2003 and June 30th, 2004?	B. Did you sell any of your products locally? (1)YES (2)NO	C. Between July 1st, 2003 and June 30th, 2004, how much was the price per unit?	D. What was the quantity you sold locally?	E. Did you export any of your produce? (1)YES (2) NO	F. Between July 1st, 2003 and June 30th, 2004, how much was the export price per unit?	G. What was the quantity you exported?	H. Between July 1st, 2003 and June 30th, 2004, what was your total cost of production?
:) CROP/ .IVESTOCK 'RODUCT	A. How much did you produce between July 1st, 2003 and June 30th, 2004?	B. Did you sell any of your products locally? (1)YES (2)NO	C. Between July 1st, 2003 and June 30th, 2004, how much was the price per unit?	D. What was the quantity you sold locally?	E. Did you export any of your produce? (1)YES (2) NO	F. Between July 1st, 2003 and June 30th, 2004, how much was the export price per unit?	G. What was the quantity you exported?	H. Between July 1st, 2003 and June 30th, 2004, what was your total cost of production?
;) CROP/ .IVESTOCK 'RODUCT	A. How much did you produce between July 1st, 2003 and June 30th, 2004?	B. Did you sell any of your products locally? (1)YES (2)NO	C. Between July 1st, 2003 and June 30th, 2004, how much was the price per unit?	D. What was the quantity you sold locally?	E. Did you export any of your produce? (1)YES (2) NO	F. Between July 1st, 2003 and June 30th, 2004, how much was the export price per unit?	G. What was the quantity you exported?	H. Between July 1st, 2003 and June 30th, 2004, what was your total cost of production?
.) CROP/ .IVESTOCK 'RODUCT	A. How much did you produce between July 1st, 2003 and June 30th, 2004?	B. Did you sell any of your products locally? (1)YES (2)NO	C. Between July 1st, 2003 and June 30th, 2004, how much was the price per unit?	D. What was the quantity you sold locally?	E. Did you export any of your produce? (1)YES (2) NO	F. Between July 1st, 2003 and June 30th, 2004, how much was the export price per unit?	G. What was the quantity you exported?	H. Between July 1st, 2003 and June 30th, 2004, what was your total cost of production?
;) CROP/ .IVESTOCK 'RODUCT	A. How much did you produce between July 1st, 2003 and June 30th, 2004?	B. Did you sell any of your products locally? (1)YES (2)NO	C. Between July 1st, 2003 and June 30th, 2004, how much was the price per unit?	D. What was the quantity you sold locally?	E. Did you export any of your produce? (1)YES (2) NO	F. Between July 1st, 2003 and June 30th, 2004, how much was the export price per unit?	G. What was the quantity you exported?	H. Between July 1st, 2003 and June 30th, 2004, what was your total cost of production?
;) CROP/ .IVESTOCK 'RODUCT	A. How much did you produce between July 1st, 2003 and June 30th, 2004?	B. Did you sell any of your products locally? (1)YES (2)NO	C. Between July 1st, 2003 and June 30th, 2004, how much was the price per unit?	D. What was the quantity you sold locally?	E. Did you export any of your produce? (1)YES (2) NO	F. Between July 1st, 2003 and June 30th, 2004, how much was the export price per unit?	G. What was the quantity you exported?	H. Between July 1st, 2003 and June 30th, 2004, what was your total cost of production

9. Between July 1st 2003 and June 30th 2004, did you receive any technical assistance from PARTNER? [COMPLETE FOR ALL THAT APPLY]
   (1) Yes
   (2) No [GO TO Q. 10]

A. Did you receive _______?	**B. Was this service provided by:** (1)extension worker (2)group trainer (3)expert visit (4)OTHER: [SPECIFY]	**C. Did you implement all, some, or none of the things you learned?** (1) YES (2) SOME (3) NONE [GO TO C1] **C*. REASON <u>NOT</u> USED:**	**D. Did you pay for the service?** (1) YES (2) NO Cost of service: LE:_____	**E. Would you recommend this to other farmers?** (1) YES (2) NO	**F. How satisfied or dissatisfied are you with the technical assistance?** (1) very satisfied (2) satisfied (3) neither (4) dissatisfied (5) very dissatisfied
Veterinary services/ animal nutrition/husbandry	(1)extension (2)training (3)expert visit (4)________		(1)Yes _____LE. (2) No	(1)Yes (2) No	
Cultivation methods	(1)extension (2)training (3)expert visit (4)________		(1)Yes _____LE. (2) No	(1)Yes (2) No	
Post-harvest processing	(1)extension (2)training (3)expert visit (4)________		(1)Yes _____LE. (2) No	(1)Yes (2) No	
Link Visits/ Farmer-to-farmer training	(1)extension (2)training (3)expert visit (4)________		(1)Yes _____LE. (2) No	(1)Yes (2) No	

MARKETING SECTION

Now I have some questions on what you have produced and sold in the last year.

10. Between July 1st 2003 and June 30th 2004, did you receive any assistance from [PARTNER] in selling your products?
    (1) YES
    (2) NO [GO TO NEXT SECTION, Q. 23]

11. Did they help you: [MARK ALL THAT APPLY]
    (1) Link with traders
    (2) Link with exporters
    (3) With contract negotiations
    (4) With drafting contracts
    (5) OTHER [SPECIFY] ___________________________________

12. In your last transaction assisted by [PARTNER], did you sell your products to
    (1) Wholesalers
    (2) Retailers
    (3) Exporters
    (4) Local agricultural cooperative
    (5) OTHER: [SPECIFY]: ______________________________

13. Did you have a written or verbal agreement with your last buyer?
    (1) written contract
    (2) verbal agreement

14. In this agreement, did you:

		YES	NO
a)	Agree on prices ahead of time		
b)	Agree on quantities ahead of time		
c)	Receive inputs from the buyer		
d)	Have transport costs paid by the buyer		
e)	Receive private extension visits from the buyer's company		
f)	OTHER [SPECIFY]		

15. Did **your buyer** meet all, some, or none of the terms of your agreement?
    (1) ALL [GO TO Q. 17]
    (2) SOME
    (3) NONE

16. What were the reasons your buyer could not meet the terms of the agreement?
____
____
____

17. Could **you** meet all, some, or none of the terms of your agreement?
    - (1) ALL [GO TO Q. 19]
    - (2) SOME
    - (3) NONE

18. What were the reasons **you could not** meet the terms of the agreement?

    ____
    ____
    ____

19. Did you need to hire any more people to fulfill this business agreement?
    - (1) YES
    - (2) NO [GO TO Q. 22]

20. How many new people did you hire? ENTER NUMBER:_________________

21. Are the new hires full time workers, part time workers or seasonal workers?
    - (1) FULL TIME WORKERS ______
    - (2) PART TIME WORKERS ______
    - (3) SEASONAL WORKERS ______

22. How satisfied or dissatisfied are you with the assistance you received from Partner in carrying out this last business agreement?
    - (1) VERY SATISFIED
    - (2) SATISFIED
    - (3) NEITHER SATISFIED NOR DISSATISFIED
    - (4) DISSATISFIED
    - (5) VERY DISSATISFIED

OVERALL RESULTS AND ASSESSMENT OF PARTNER SERVICES

23. Are there any other services that you would need/like [PARTNER] to provide?
    - (1) YES
    - (2) NO [GO TO Q. 25]

24. What are these services?

    ____
    ____
    ____

25. Is there any type of information that you need that you do not currently receive? [MARK ALL THAT APPLY]
    - (1) Animal production technology
    - (2) Crop production Technology
    - (3) Post harvest technology
    - (4) Input utilization
    - (5) Market information
    - (6) Other [SPECIFY] ______________________________________

26. From July 1st 2003 to June 30th 2004, did your total income increase compared with the previous year?
    - (1) Yes
    - (2) No [GO TO Q. 29]

27. By how much did it increase?
    _________________% [ENTER PERCENTAGE]

28. Did you spend all, some or none of that additional income on _____?

    a) Farm improvements (equipment, inputs, and more land/livestock)
    - (1) ALL
    - (2) SOME
    - (3) NONE

    b) Family (consumption, health, education)
    - (1) ALL
    - (2) SOME
    - (3) NONE

    c) House improvements (renovations, etc)
    - (1) ALL
    - (2) SOME
    - (3) NONE

    d) Savings
    - (1) ALL
    - (2) SOME
    - (3) NONE

29. Overall, how satisfied are you with the [PARTNER] services?
    - (1) VERY SATISFIED
    - (2) SATISFIED
    - (3) NEITHER SATISFIED NOR DISSATISFIED
    - (4) DISSATISFIED
    - (5) VERY DISSATISFIED

30. Would you recommend [PARTNER] services to other farmers?
    (1) YES
    (2) NO

31. How could [PARTNER] improve its services?
    (1) ____
    (2) ____
    (3) ____
    (4) None
    [END OF INTERVIEW]

Thank you for your time and cooperation.

APPENDIX IX: LIST OF INTERVIEWS

BUSINESSES

Business Name	Partner	Governorate
Aga	ALEB	Cairo
Agro Food	ALEB	Cairo
Agro Green	ALEB	Cairo
Arco Trade	ALEB	Cairo
Arma Food Industries	ALEB	Cairo
Cold Alex	ALEB	Alex
Delta Aromatic International	ALEB	Cairo
Dr. Farouk El Shobky Trade Export Agencies El Shobky	ALEB	Cairo
EGINTEX	ALEB	Alex
Egyptian American Agriculture Trading	ALEB	Cairo
Egyptian Trading for Herbs and Seeds	ALEB	Cairo
El Amal Co. for Trade and Agencies	ALEB	Cairo
New Salheya olive oil	ALEB	Cairo
El Samahy Pickles	ALEB	Cairo
Foodico	ALEB	Cairo
Dehydro Food	ALEB	Cairo
Hi Tadi	ALEB	Alex
International Co. for Land Reclamation & Cultivation	ALEB	Alex
Interk	ALEB	Alex
Light Food	ALEB	Cairo
MASHA	ALEB	Cairo
Mina for Oils	ALEB	Cairo
Cairo Agro Processing	ALEB	Cairo
Olive Hill	ALEB	Cairo
Ramo	ALEB	Cairo
Ramses Fresh	ALEB	Cairo
Royal Gulf Trading	ALEB	Cairo
Seklam Company	ALEB	Alex
SEKEM	ALEB	Cairo
SGS	ALEB	Cairo
Sonac	ALEB	Alex
Star Chemicals	ALEB	Cairo
Unitel	ALEB	Alex
El Mabrouk	ALEB	Alex
Aromatico	ALEB	Alex
Safety Egypt	ALEB	Cairo
Egyptian International Company for Food Industries (Dimo)	ALEB	Cairo
Unifood	ALEB	Cairo
El Salam Co. for Trading & Distribution	ALEB	Cairo
Mansour Distribution Co.	ALEB	Cairo
Montana	ALEB	Cairo
Heinz	ALEB	Cairo
Royal for Herbs & Spices	ALEB	Cairo
FMCG Trading	ALEB	Cairo

Business Name	Partner	Governorate
Wadi Food	ALEB	Cairo
KHB	ALEB	Cairo
Barcah Agricultural Group	ALEB	Cairo
El Orouba for Food Processing Co. (Basma)	ALEB	Cairo
CATSCO	ALEB	Cairo
Aramco	ALEB	Cairo
AGROTECH Co. Modern Agriculture	ALEB	Cairo
EMCCO for Oils & Food Industries	ALEB	Cairo
TibaLand	ALEB	Cairo
SFI - Special Food International	ALEB	Cairo
Mass Food Temmy's	ALEB	Cairo
La Poire	ALEB	Cairo
Al Hassana Marble	Expolink	Cairo
Al Sakr Food Production	Expolink	Alex
Alpha Leather Co.	Expolink	Cairo
Arab Co.for Marble & Granite	Expolink	Alex
Art Group	Expolink	Cairo
Deeptex	Expolink	Alex
Delta Industries	Expolink	Cairo
Dice Sports & Casual	Expolink	Cairo
Egyptian Knitting and Ready Made Co.	Expolink	Cairo
Egyptian Trade & Industry Co.	Expolink	Cairo
El Wadi Marble & Granite	Expolink	Cairo
Enjoy	Expolink	Giza
Fabrique De Flanelles Samir	Expolink	Cairo
Heraclyes	Expolink	Cairo
Match for Leather products	Expolink	Cairo
Misr El Nour Group for Plastic Packages Marble & Granite	Expolink	Cairo
Short for Leather Industries	Expolink	Cairo
Al Home	Expolink	Cairo
Al Motassem Worked Marble & Granite	Expolink	Cairo
Shoaay Co.	Expolink	Cairo
Crystal	Expolink	Cairo
EduFun	Expolink	Cairo
Emporio	Expolink	Cairo
Hafez & Ouda Co.	Expolink	Cairo
International Aromatics SAE	Expolink	Alex
Kazrouni	Expolink	Cairo
La Rouche Furniture	Expolink	Cairo
Mekka for Granite	Expolink	Cairo
Nile Tricot	Expolink	Cairo
Nooreast for Import & Export	Expolink	Cairo
Paste & Juice Company	Expolink	Cairo
Seif El Din Company	Expolink	Alex
Solitaire for aTrade & Consultancy	Expolink	Alex
Zahratex Co.	Expolink	Cairo
Decopan	Expolink	Cairo
International Company for Ready Made Garments EDCO Fashion (Ted Lapidus)	Expolink	Cairo
El Hamd	Expolink	Cairo

Business Name	Partner	Governorate
El Mohandes- Comby	Expolink	Cairo
El Shabrawy	Expolink	Cairo
Foldcraft LTD	Expolink	Cairo
Jemmy Trade	Expolink	Alex
With the Wood Furniture	Expolink	Cairo
Wood Metal Bamboo	Expolink	Cairo
Egypt Clothing (SAE)	Expolink	Cairo
Mohm Multi M. Group	Expolink	Cairo
Style Furniture	Expolink	Cairo
Continental Comfort	Expolink	Cairo
Nahdet Misr	Expolink	Cairo
WoodLine	Expolink	Cairo
Agrico Binco	Expolink	Alex
Dreem SAE	Expolink	Alex
Misr Al Amria Spinning & Weaving Co.	Expolink	Alex
Vestia Ready Made Garments	Expolink	Alex
Samia Group	Expolink	Cairo
Wood Pecker	Expolink	Cairo
Le Coin	Expolink	Cairo
Kemet Natural Food Co.	Expolink	Cairo
Gino for Trade & Manufacturing	Expolink	Cairo
Egyptian Fibre Manufacturing & Products Co. (Bed Taki)	Expolink	Cairo
Collection Co.(For Antique Reproduction)	Expolink	Cairo
Golden Foods Co.	Expolink	Cairo
Mardini Tex for Spinning & Weaving	Expolink	Cairo
Green Art	Expolink	Cairo
Al Kamal	Expolink	Cairo
Boi et Soie	Expolink	Cairo
Egyptian Metal and Wood	Expolink	Cairo
MEUBLE EL CHARK	Expolink	Cairo
Master Bed	Expolink	Cairo
Midmore Trading	Expolink	Cairo
Kazareen Co. Ltd	Expolink	Cairo
Contracting Architecture Trading (CAT)	Expolink	Cairo
World Trading Co.	Expolink	Cairo
La Terrasse	Expolink	Cairo
Egyptian European Canadian Co.	Expolink	Cairo
Makarem Group	Expolink	Cairo
International Co. for Ready Made Garments	Expolink	Cairo
Nile Valley for Agricultural Development	Expolink	Cairo
Abou Bakr Soliman	Expolink	Cairo
Farm Frits	Expolink	Cairo
Daltex	Expolink	Cairo
EGCT	Expolink	Alex
NASGEYAT	Expolink	Cairo
Abou Gabal Farm	HEIA	Cairo
Abou Zeid Farm	HEIA	Cairo
Alaa Abou Aly Farm	HEIA	Cairo
Abd El Hay Farm (Karma)	HEIA	Cairo
African Company	HEIA	Cairo

Business Name	Partner	Governorate
Centec	HEIA	Cairo
Delta Express	HEIA	Cairo
Dr. Ahmed Darbala Farm	HEIA	Cairo
Egyptian Group for Developmemt	HEIA	Cairo
Al Wakeel Farm	HEIA	Alex.
El Abd Farm	HEIA	Cairo
El Barakat Farm	HEIA	Cairo
National Company for Agricultural Development	HEIA	Cairo
El Fayrouz Farm	HEIA	Cairo
Harras Farm	HEIA	Cairo
High Land Farm	HEIA	Cairo
Hussein Ismail Farm	HEIA	Cairo
Hydro Agry Trade Egypt	HEIA	Cairo
International Group for Trade and Investment	HEIA	Cairo
Lotus Foreign Trade	HEIA	Cairo
Shams International Co. for sustainable agriculture & development	HEIA	Giza
Orchard	HEIA	Cairo
Printing and Packaging Technology	HEIA	Alex.
Riad El Momenien Farm	HEIA	Cairo
Salama Farm	HEIA	Cairo
Samir Allam Farm	HEIA	Cairo
Sobki Farm	HEIA	Cairo
Soffar Farm	HEIA	Alex.
Techno Green Farm	HEIA	Cairo
Zawbaa Farm	HEIA	Cairo
Abou Sediera Farm	HEIA	Cairo
Ez El Din Amin Farm	HEIA	Cairo
EL Gameya el Motamadeya (private farm)	HEIA	Cairo
Alexandria Agricultural Co.	HEIA	Alex.
Touma Farm	HEIA	Alex.
Mamdouh Mamdouh Farm	HEIA	Cairo
Rowdet Aswan Farm	HEIA	Cairo
El Hoda Farm	HEIA	Cairo
Arab Project for Agricultural Development	HEIA	Cairo
Abou Hagar Farm (Trans World Trading (TWT))	HEIA	Cairo
El Saadya Farm	HEIA	Cairo
El Boghdady Farm	HEIA	Cairo
El 'escily Farm	HEIA	Cairo
Tree & Tree	HEIA	Cairo
Meli Co.	HEIA	Cairo
Hady Farm	HEIA	Cairo
Belco	HEIA	Cairo
PICO	HEIA	Cairo
Kafr Dawood Farms - Agro Farms	HEIA	Cairo
El Shams Agro Group (SAG)	HEIA	Cairo
Fakhry Farm	HEIA	Cairo
Floramix	HEIA	Giza
Nora Farm	HEIA	Cairo
Metro Market (Ihab I Khalil Farm)	HEIA	Cairo

Business Name	Partner	Governorate
Falcon	HEIA	Alex.
Egyptian Agro Service Centers (S.A.E) - Standard	HEIA	Cairo
Homin Co. Export & Import	HEIA	Cairo
Mostafa Bassem Farm	HEIA	Cairo
El Zeini Farm	HEIA	Cairo
New Motors	HEIA	Cairo
Al Zahya Garden	HEIA	Cairo
Creation for Advertising	HEIA	Cairo
Bita Engineering & Trading Co.-Awny Abd El Hamid Farm)	HEIA	Cairo
Medhat Omar Farm	HEIA	Cairo
Bakry Farm	HEIA	Cairo
Harco Farm	HEIA	Cairo

ASSOCIATIONS

Egyptian Chef's Association (ECA)
EXPOLINK
Horticultural Exports Improvement Association (HEIA)
Egyptian Society of Association Executives (EGSAE)
Egyptian Investors and Business Association of Mansoura (EIBA)
Food Commodity Council (FCC)
Chamber of Food Industries (CFI)
Egyptian Seed and Pesticide Traders Association (ESPTA)
Egyptian Spices and Herbs Export Development Association (ESHEDA)
Alexandria Businessmen's Association (ABA)

SMALLHOLDERS

Name	Governorate	Farmer Association	Partner
Hazem Mohamed Abdel Aziz	Fayoum	Marghany	Agreform
Gomaa Abdel Aziz Ali	Fayoum	El Khargeen	Agreform
Ali Gouda Said	Fayoum	Salem Gad	Agreform
Mahmoud Sultan	Fayoum	Kasr El Basel	Agreform
Mohamed Imam Abu Haris	Fayoum	Samaan farm	Agreform
Mounir Mostafa Housni	Fayoum	El Makrani	Agreform
Yehia Atwa Ali Saleh	Fayoum	bany saleh	Agreform
Saadawy Mohamed Saadawy	Fayoum	El Khargyn	Agreform
Karem Mahmoud Badawi	Fayoum	Bani Saleh (Samaan)	Agreform
Said Youssef	Fayoum	El Basyonia	Agreform
Khalifa Arafat Ali	Fayoum	El Khargeen	Agreform
Hussein Sobhy Eid	Fayoum	Samaan farm	Agreform
Ali Khalil	Fayoum	El Basyonia	Agreform
Arafa Mohreb Yoness	Fayoum	El Basyonia	Agreform
Badawi Mohamed Badawi	Fayoum	Samaan	Agreform
Helal Farahat	Fayoum	El Basyonia	Agreform
Eid Ali Moftah	Fayoum	El Basyonia	Agreform
Eid Kaleib Mahmoud	Fayoum	El Basyonia	Agreform
Shaban Gomaa Ali	Fayoum	Kasr El Basel	Agreform
Sayed Ahmed Mohmed	Fayoum	Samaan farm	Agreform
Gamal Ahmed Nayel	Fayoum	El khargeen	Agreform
Moahmed Osman Mohamed	Fayoum	El Basyonia	Agreform
Mamdouh Ali Mohamed	Fayoum	Kasr El Basel	Agreform
Mohmoud Yossef Habib	Fayoum	Nakalif	Agreform
Abdel Hamid Abdel Alim El Sayed	Fayoum	Kasr El Basel	Agreform
Aly Tawfik Aly	Fayoum	Kasr El Basel	Agreform
Sayed Mahdy	Fayoum	Kasr El Basel	Agreform
Adly Eid Shahat	Fayoum	Kasr El Basel	Agreform
Abou Hamed Salem	Fayoum	Kasr El Basel	Agreform
Hussein Korany Abdel Tawab	Fayoum	Samaan farm	Agreform
Abdel Salam Abdel Tawab	Fayoum	Samaan farm	Agreform
Mahmoud Hassanein	Fayoum	Samaan farm	Agreform
Aly El Sayed Waly	Fayoum	Samaan farm	Agreform
Sayed AbdelGany	Qena	Al Wakf	Agreform
Hashem Salem Ali	Qena	NGO Bahary	Agreform
Nader Besada	Qena	El Tood	Agreform
Mohamed Kamel Ahmed Ali	Qena	El Tood	Agreform
Abdel Fattah Mohamoud	Qena	NGO Bahary	Agreform
Rkabee Ahmed Mohamoud	Qena	NGO Bahary	Agreform
Mohamed Alaa	Qena	NGO Bahary	Agreform
Noby AbdelBaset	Qena	El Tood	Agreform
Said Mohamed Ahmed	Qena	El Tood	Agreform
Mohamed AbdelSayed Rezk	Qena	El Tood	Agreform
Ahmed Mahmoud Ali	Qena	El Zafria	Agreform
Moahmed Moubark	Qena	Al Wakf	Agreform
Ali Mohamed Mahmoud	Qena	Al Wakf	Agreform
Hassan Ali Mohamed	Qena	Al Wakf	Agreform

Name	Governorate	Farmer Association	Partner
Mohamed Ahmed Elasuty	Qena	Awlad El Sheikh	Agreform
Hassan Mohamed Mousy	Qena	El Mohamid Bahary	Agreform
AbdelShafy Ahmed Mohamed	Qena	El Mohamid Baharay	Agreform
Mrs. Reda Madny Badry	Qena	NGO bahary	Agreform
Zakaria Moaen Hassan	Qena	El Zafria	Agreform
AbdelWahab Senousy Osman	Qena	Awlad El Sheikh	Agreform
AbdelRehim Saaid	Qena	Deufeek	Agreform
Mohamed El Said	Qena	Awlad El Sheikh	Agreform
Saed El Nagar Mohamed	Qena	Awlad El Sheikh	Agreform
AbdelKarim Ahmed Mohamed	Qena	El Mohamid Bahary	Agreform
Hamdeto Massoud Ali	Qena	Danfeek	Agreform
AbdelKarim Ahmed	Qena	El Mohamid Baharay	Agreform
Gamal El Din Galal	Qena	Tomas	Agreform
Fatoh Ahmed AbdelRahim	Qena	El Zafria	Agreform
Sana Yassin Abdo	Qena	Tomas	Agreform
Safa Hassan	Qena	Tomas	Agreform
El Motawkel Abd El Gafour	Qena	Tomas	Agreform
Harbia Mohamoud	Qena	El Zafria	Agreform
Farag Galoul Hussein	Souhag	Awlad Khalaf	Agreform
Abdel Hamid Ahmed	Souhag	Awllad Khalef Village	Agreform
Abdel Azeem Mahmoud Hesham	Souhag	El Shoorany Village	Agreform
Abdel Aziz Mahmoud Mohamed	Souhag	El Shoorany Village	Agreform
Ahmed Abou Daif Mohamed	Souhag	El Gobyrat	Agreform
Khairi Mohamed Osman	Souhag	Bait Khalaf Village	Agreform
Ghassoub Moussa	Souhag	Bait Khalaf Village	Agreform
Ahmed Mohamed Ahmed	Souhag	Bait Khalaf Village	Agreform
Mohamed Osman Mohamed	Souhag	El Shoorany Village	Agreform
Adham Abo Shama	Souhag	El Shoorany Village	Agreform
Abdel Lateef Saber Mohamed	Souhag	El Shoorany Village	Agreform
Abdel Aall Seddik Aly	Souhag	Bait Khalaf Village	Agreform
Bekhit Hussein	Souhag	Gharab Tahta Village	Agreform
Abdel Khalek Mohamed	Souhag	El Gobyrat	Agreform
Ahmed Hassan Ibrahim	Souhag	El Gobyrat	Agreform
Ahmed Mohamoud Abdel Kireem	Souhag	Gharab Tahta Village	Agreform
Abou Daif Ahmed	Souhag	Gharab Tahta Village	Agreform
Ali Abou Zeid	Souhag	Bait Khalaf Village	Agreform
Mohamed Soliman	Souhag	Gharab Tahta Village	Agreform
El Ased Selim Lowandy	Souhag	Awlad Yehia	Agreform
Azz Eldin Ahmed	Souhag	El Gobyrat	Agreform
Sabria Ahmed Ali	Souhag	Awlad Yehia	Agreform
Farag Ahmed Ali	Souhag	Awlad Yehia	Agreform
Ayman El Sayed	Souhag	Awlad Yehia	Agreform
Kamel Nour El Din Mohamed	Souhag	Mazata Village	Agreform
El Fouly Aboud Abais	Souhag	Mazata Village	Agreform
Rafaat AbdelHamid Ali	Souhag	Awlad Yehia	Agreform
Abdeen Ibrahim	Souhag	Mazata Village	Agreform
Fakry Amin Abdel Ghaffar	Souhag	Mazata Village	Agreform
Mahrous Nashed	Menia	El Tawfekeya village	Aglink
Saadya Mohamed Abdel-Ghani	Menia	Talla village	Aglink
Ahmed Mohamoud Abdel Ghani	Menia	Talla village	Aglink

Name	Governorate	Farmer Association	Partner
Mostafa Abdel Kader	Menia	Talla village	Aglink
Naeema Khalifa	Menia	Talla village	Aglink
Inaam Abdel Azim	Menia	Talla village	Aglink
Fatheya Ali	Menia	Talla village	Aglink
Fawzya Boshra Shaker	Menia	Talla village	Aglink
Layla Ahmed Touby	Menia	Talla village	Aglink
Mamdouh Mohamed Osman	Menia	Klosna village	Aglink
Khalaf Mahmoud Mohamed	Menia	Klosna village	Aglink
Adallah Senousi	Menia	Klosna village	Aglink
El Fouly Ahmed El Sayed	Menia	Saft El Khamman	Aglink
Amal Khalaf Mahmoud	Menia	Klosna village	Aglink
Khalaf Omar Auob	Menia	El Amoudein village	Aglink
Adel Shaker	Menia	El Amoudein village	Aglink
Farhan Sayed Youssef	Menia	El Amoudein village	Aglink
Khalaf Sayeed	Menia	El Amoudein village	Aglink
Farouk Rady Nasr	Menia	El Tawfekeya village	Aglink
Ishaak Abdallah	Menia	El Tawfekeya village	Aglink
Gamalat Khalifa	Menia	Samalout (Azba'a El Basha)	Aglink
Milad Youssef	Menia	Samalout (Azba'a El Basha)	Aglink
Maher leissy	Menia	Samalout (Azba'a El Basha)	Aglink
Azza Kamal Kameel	Menia	Samalout (Azba'a El Basha)	Aglink
Zeinab Abdel Hamid	Menia	Samalout (Azba'a El Basha)	Aglink
Samir Botros	Menia	Bani Kamger village(Bani Ghani village)	Aglink
Mohamed Abu Bakr	Menia	Bani Kamger village	Aglink
Abdalla Abdel Hakam	Menia	Bani Ghani village	Aglink
Magdy Khalaf Ahmed	Menia	Bani Ghani village	Aglink
Salem Selim Refaai	Menia	Bani Kamger village	Aglink
Ashour Korany	Menia	Hassan Basha	Aglink
Mohamed Abdel Hakim	Menia	Bani Kamger village	Aglink
Nagat Mohamed Abdelhamid	Menia	Samalout (Azba'a El Basha)	Aglink
Emad Abdel Aziz	Menia	El Borgaya	Aglink
Omar Abdel Shafi	Menia	Bani Kamger village	Aglink
Abdel Nasser	Souhag	Awlad Khalaf	Agreform